



CPBI | CANADIAN PENSION
& BENEFITS INSTITUTE



Education and Networking 2025

LEARN SOMETHING NEW. MEET SOMEONE NEW.

To make sound decisions for your organization, you need reliable, up-to-date information from a trusted source. That's where we come in.

CPBI's mission is to lead the professional development of the Canadian pension and benefits industry via networking and educational content and bring people together to build relationships and exchange ideas in a safe, respectful, and inclusive environment.

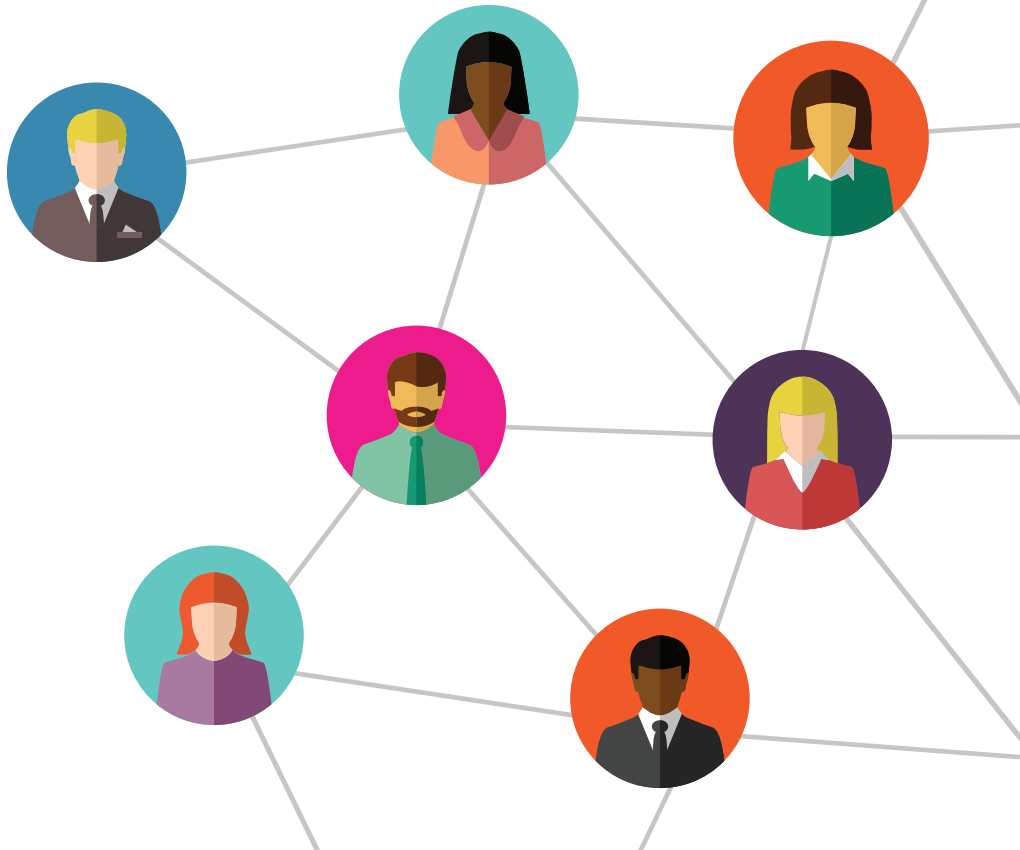
CPBI is the largest Canadian-based association of professionals active in the pension and benefits industry.

"At the end of the day, we all strive to become better at what we do and who we serve in our respective organizations."

- Don Forbes, CPBI Northern Alberta Region Council Member

"I became involved with CPBI over 15 years ago and benefited immensely from connecting with peers, exchanging on best practices and keeping current on employee benefits and pension plan trends."

- Tami Dove, Director, Member Experience, CSS Pension Plan & CPBI National Board Member



WHY CPBI

YOUR PENSION & BENEFITS ASSOCIATION

CPBI is a not-for-profit association designed for professionals like you and is powered by volunteers who use their expertise and industry knowledge to develop and deliver programs that promote professional development.



EDUCATIONAL EVENTS THAT MEET YOUR NEEDS

Whether you're a plan sponsor, trustee, advisor, consultant, or provider in Canada, we have the educational offering that you need. From single sessions to three-day conferences, CPBI events deliver unbiased education on timely hot topics in the pension and benefits space.



EASY ACCESS

In-person or online, the choice is yours: Participate in national and regional in-person events and conferences, register for webinars and online on-demand learning without leaving your office or mix it up.

- ! **Membership Perks! CPBI members save up to 35% on all in-person and online seminars, sessions and courses.**
- **Members save close to \$500 on any conference registration.**



CONTINUING EDUCATION

Our accredited content is professionally developed and presented by industry experts committed to delivering unbiased education, leading to continuing education (CE) credits.



NETWORKING

CPBI's networking opportunities are unparalleled. Our events are the ideal place for you to meet, network and share ideas with other industry professionals. Experience social learning at its best while connecting with peers and meeting someone new.

- ! **CPBI members have exclusive access to the Members' Directory with 2,000 listings, with job titles, areas of specialty and contact information.**



IN-PERSON LEARNING

CPBI organizes in-person events in every province from coast to coast.

SEMINARS & SESSIONS

Single or multi-session seminars are organized regularly across Canada to address relevant topics that are important in the industry.

REGIONAL CONFERENCES

CPBI organizes 2 to 3 regional conferences a year. Regional conferences focus on topics and trends pertinent to the region in which the conference takes place.

NATIONAL CONFERENCE: CPBI FORUM

FORUM is CPBI's annual national conference. It is a dynamic three-day event for pension and benefits professionals who want to learn about our ever-evolving industry. CPBI FORUM is attended by professionals from across the country.

FUNDAMENTALS

CPBI offers a variety of fundamental courses on benefits, pensions and investments. These courses offer various learning opportunities to develop a solid foundation of concepts or to enhance skills needed to support your organization, all while obtaining continuing education (CE) credits. Fundamental courses are led by some of the most respected and sought-after experts in the industry and are typically offered in-person in most CPBI Regions.

Courses range from half-day to multi-day formats, and vary from basics in benefits or pension, to more advanced content.

Fundamental courses are designed for benefits or pension plan sponsors, plan administrators, HR professionals, union representatives, trustee or pension committee members, actuaries, consultants, or anyone who is new to the pension and benefits space or who wishes to deepen their knowledge.

"I became involved with CPBI and immediately benefited from the mentorship of many professionals with benefit and pension expertise that I would not have had the opportunity to network with otherwise."

- Kim N. Ross, Manager, Benefit Services, Toronto Transit Commission
& CPBI Ontario Region Council Member



ONLINE LEARNING

Free for Members

NATIONAL WEBINAR SERIES

Attend our National Webinar Series for a deep dive into important topics without leaving your home or office. The webinars are delivered by recognized industry thought leaders, are released monthly, lead to CE credits and are free for members.

Members Save 35%

ONLINE SEMINARS

Register for online seminars and watch these live in real-time, or watch them later at a time that works for you. Special pricing for members.

Members Save 35%

ON-DEMAND LEARNING

Missed an online session? No worries, you can always register for it and access it on-demand (registration fees apply).

Free for Members

CPBI-ONLINE

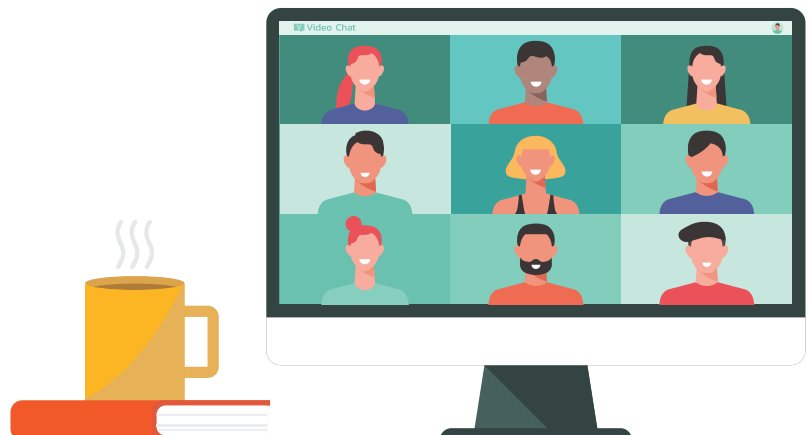
A free collection of exclusive, online learning is just a click away! As a CPBI member, you have exclusive access to free online learning on the CPBI website. Much of the content is CE accredited and content is updated regularly.

CANADIAN BENEFITS CERTIFICATE PROGRAM

(offered by CPBI Ontario in partnership with HRPB)
This live real-time virtual course is composed of eight modules and is an opportunity to enhance your skills and learn about new topics and trends in the administration of employee benefit plans. Topics covered: basics, effective plan management, cost control, and more. Target audience: HR Professionals tasked with hiring and retaining talent in the organization. C-suite executives who wish to understand Group benefits programs.

CANADIAN PENSION CERTIFICATE PROGRAM

(offered by CPBI Ontario in partnership with HRPB)
This live real-time virtual course is composed of eight modules and will allow you to master one of the most important elements of employee compensation: pension and retirement savings. Topics covered: legal and regulatory framework of pensions and other retirement savings plans, best practices in plan administration and governance, strategies to reduce risk and liability in plan administration, investment and plan structure principles across different plan types. Target audience: HR practitioners, Pension Trustees and Committee Members, C-suite Executives, Finance Managers, Analysts, Pension Specialists, HR Consultants, Business Owners.



2025 CONFERENCES



**CPBI SASKATCHEWAN
REGIONAL CONFERENCE**
(In-Person & Virtual)
April 15-17, 2025
Saskatoon, Saskatchewan
saskatchewan@cpbi-icra.ca

CPBI Saskatchewan is proud of its prairie roots and strong membership. This two-and-a-half-day annual regional conference delivers great keynotes and educational sessions on pensions, employee benefits and investment.



**CPBI FORUM 2025
NATIONAL CONFERENCE**
June 2-4, 2025
Vancouver, British Columbia
(In-Person & Virtual)
forum@cpbi-icra.ca

CPBI FORUM is a dynamic three-day journey designed for pension and benefits professionals who want to learn about our ever-evolving industry, be inspired, and be equipped with the tools they need to succeed in their roles. About 600 participants attend the CPBI FORUM (300 attend in-person), of which 60% are plan sponsors. Participants can choose from over 25 sessions focused on employee benefits, pension, and investment topics, as well as participate in roundtable discussions and engaging workshops. FORUM is CPBI's premier event, attracting a nationwide audience.



**CPBI ATLANTIC 2025
REGIONAL CONFERENCE**
October 8-10, 2025
Charlottetown, Prince Edward Island
atlanticconference@cpbi-icra.ca

The Atlantic Regional Conference draws over 200 plan sponsors, provincial government representatives, union leaders, employee benefit plan trustees, industry stakeholders and service providers, from Atlantic Canada as well as other regions across Canada. Known for its thought-provoking keynote speakers, high caliber educational content, incredible networking opportunities and fun, this is an event you will not want to miss.

BE PART OF THE CPBI COMMUNITY

PLAN SPONSORS

Two-thirds of CPBI members are plan sponsors. Whether you are part of a single employer, multiemployer or public employer plan, CPBI's ongoing content and events are designed to maximize plan sponsor engagement. We produce educational content with plan sponsors in mind, available both in-person and online, and a continued emphasis on accredited, unbiased education. Networking events across the country allow plan sponsors to connect with peers and exchange on shared challenges and best practices.

TRUSTEES & COMMITTEE MEMBERS

If you are a trustee or a committee member, you need up-to-date knowledge about the industry to act in the best interest of plan beneficiaries. This may require participating in educational activities to stay current to diligently carry out your fiduciary responsibilities. CPBI offers high-quality, unbiased educational sessions with outstanding value from an educational and financial standpoint.

SERVICE PROVIDERS

Providers serving the Canadian benefits, retirement savings and pension investment industry know the importance of maintaining visibility with plan sponsors and other business partners throughout the year. CPBI is a great place to network, learn, share best practices, discuss solutions, and grow. Relationships are fostered and networks are developed.

ADVISORS

Are you a consultant or group plan advisor? We can help you build your network, your knowledge and your visibility. CPBI conferences and events provide ideal networking opportunities and are also a great venue to bring clients as guests. You can expand your industry knowledge through our in-person and online educational sessions that lead to CE credits.

MEMBERSHIP BREAKDOWN



SPONSORSHIP OPPORTUNITIES

CPBI is ideally positioned to assist with your go-to-market strategy and connect you with plan sponsors and advisors.

Strengthen your brand by joining the CPBI National Partnership Program or one of our eight Regions' Sponsorship Programs, which provide in-person and online visibility to an audience that matters to you.

JOB POSTINGS

Access targeted industry talent with ease using CPBI's job posting service. We streamline your recruitment process by connecting you with qualified candidates through our daily job alert service to members and monthly newsletter.

Advertise your jobs with CPBI. You will get great visibility for 60 days for your job posting on the CPBI website, and distribution reach to our network of 10,000 CPBI users. Members further benefit from exclusive pricing offers.

THESE ARE DESIGNED TO HELP YOU:



CPBI REACH



PARTNER WITH CPBI TODAY.

Contact us for more information
info@cpbi-icra.ca

MEMBERSHIP

INDIVIDUAL MEMBERSHIPS

REGULAR MEMBERSHIP

A CPBI annual membership pays for itself as members save on conferences, courses, seminars and job postings.

\$345

ASSOCIATE MEMBERSHIP

For professionals who have retired from the industry or are not currently employed.

\$60

STUDENT MEMBERSHIP

For full-time students.

\$35

GROUP MEMBERSHIPS

PLAN SPONSOR MEMBERSHIP

CPBI understands that, as a plan sponsor, you may have several associates who share responsibility for your benefits and pension plan management. We offer three options for plan sponsor members employed by the same organization:

\$1,850

TIER 1

buys an annual membership for up to 10 individuals from the same organization, plus 2 free in-person and 10 online passes to the National CPBI FORUM.

A \$10,000 value

\$3,700

TIER 2

buys an annual membership for up to 20 individuals from the same organization, plus 4 free in-person and 20 online passes to the National CPBI FORUM.

A \$20,000 value

\$6,800

TIER 3

buys an annual membership for an unlimited number of individuals from the same organization, plus 6 free in-person and unlimited online passes to the National CPBI FORUM.

A priceless package

*Membership dues valid for 2025

"The Group Membership makes sense for our organization as it is the most cost-effective option for our team to take part in CPBI's activities. Value for money, flexibility and complimentary tickets to the National Conference FORUM are great perks, not to mention the high quality of the educational and networking sessions."

- Glen Anderson, The Manitoba Teachers' Society

PROVIDER/ADVISOR GROUP MEMBERSHIP

This flexible and cost-effective solution includes an annual membership for up to 10 individuals from the same organization.

\$2,760

Visit www.cpbi-icra.ca for more information

THE CPBI MEMBER ADVANTAGE

10 REASONS TO JOIN CPBI

1 FREE NATIONAL WEBINARS.

2 EXCLUSIVE ACCESS TO FREE ONLINE LEARNING.

3 EXCLUSIVE ACCESS TO CPBI'S MEMBERS' DIRECTORY.

4 IN-PERSON AND ONLINE EVENT DISCOUNTS.

5 ALL THE CE CREDITS YOU NEED.

6 NETWORKING MADE EASY ACROSS THE COUNTRY.
MEET SOMEONE NEW!

7 MEMBER PRICING ON JOB POSTINGS: ADVERTISE YOUR JOBS!

8 RECEIVE JOB ALERT EMAILS TO FIND YOUR NEXT CAREER
OPPORTUNITY & POST FREE CAREER APPOINTMENT NOTICES.

9 VOLUNTEER! MAKE A DIFFERENCE & CONTRIBUTE BY JOINING
A CPBI COMMITTEE.

10 COST-EFFECTIVE GROUP MEMBERSHIP OPTIONS FOR YOUR
ORGANIZATION.

*Visit www.cpbi-icra.ca for a full list of what is included in your membership.

BECOME A MEMBER TODAY!

Visit cpbi-icra.ca/Membership members@cpbi-icra.ca 1-888-788-3185

CPBI REGIONS

CPBI is a national organization with an on-the-ground presence in eight Canadian Regions. For more information about regional in-person and online learning and networking, or to get involved as a volunteer with one of our Regional Councils or Committees, contact us today!



For information or to become involved with CPBI Atlantic, contact: atlantic@cpbi-icra.ca



For information or to become involved with CPBI Quebec, contact: quebec@cpbi-icra.ca



For information or to become involved with CPBI Ontario, contact: ontario@cpbi-icra.ca



For information or to become involved with CPBI Manitoba, contact: manitoba@cpbi-icra.ca



For information or to become involved with CPBI Saskatchewan, contact: saskatchewan@cpbi-icra.ca



For information or to become involved with CPBI Northern Alberta, contact: albertanorth@cpbi-icra.ca



For information or to become involved with CPBI Southern Alberta, contact: albertasouth@cpbi-icra.ca



For information or to become involved with CPBI Pacific, contact: pacific@cpbi-icra.ca



Get involved!
Be part of the
250
active CPBI
volunteers!

CPBI NATIONAL OFFICE

410-4060 Sainte-Catherine St. West
Westmount, QC. H3Z 2Z3
1 888 788-3185 / 514 288-1222
info@cpbi-icra.ca



AN INVESTMENT IN CPBI IS AN INVESTMENT IN YOURSELF. LEARN SOMETHING NEW. MEET SOMEONE NEW.



COMPLIANCE

- Get the information & education you need, when you need it, to stay compliant.
- Most of our educational sessions lead to CE credits.



NETWORKING

- Networking has never been so easy.
- National and regional events.
- Access to our Members' Directory.



MAKE A DIFFERENCE BY:

- Volunteering.
- Proposing relevant topics for educational sessions & conferences.
- Participating & exchanging with your peers.



JOBS & CAREERS

- Daily job alert email service.
- Free career appointment notices.
- Access targeted industry talent with ease.

"I joined CPBI with a firm intent of becoming as actively involved as possible in order to contribute and help shape the programs and events that CPBI delivers. I enjoy finding new ways to enhance the value that CPBI brings to its members and other industry professionals."

- Mike Macoun, People Corporation
& CPBI National Board Member



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