



# A CLIMATE FOR **INNOVATION**

Exploring **SUSTAINABLE RETIREMENT**

2022 ACPM  
**NATIONAL  
CONFERENCE**

[acpm.com](https://acpm.com)



## CONFERENCE PROGRAM

**SEPTEMBER 27-29**

ST. JOHN'S, NL

Delta Hotels St. John's Conference Centre

DIAMOND SPONSOR





## WELCOME TO NEWFOUNDLAND AND LABRADOR!

Newfoundland and Labrador is more than three times the total area of the Maritime Provinces (Nova Scotia, New Brunswick, and Prince Edward Island) and would rank fourth in size behind Alaska, Texas, and California. With more than 29,000 kilometres of coastline, it's easy to spot whales, seabirds, and icebergs. There are 22 species of whales alone, including the world's largest migrating population of humpbacks. Flying high above are 35 million seabirds, which is why Newfoundland and Labrador is the seabird capital of North America. And if iceberg watching is something on your list, Iceberg Alley is the best place on the continent to see these 10,000-year-old frosty giants.

The population is approximately 525,000 and there are more varieties of English spoken in Newfoundland and Labrador than anywhere else in the world. Dating back four centuries, the accents are rooted in western England and southern Ireland and influenced by French and Indigenous populations. And it's more than just accents; they have their own dictionary and encyclopaedia — the [Dictionary of Newfoundland English](#).

***Join us in St. John's, the capital city of Newfoundland and Labrador, and be prepared to journey to the end of the world!***

After two years of the global pandemic, we are now emerging from our isolation and are discovering that the world we knew may be changed forever. The **2022 ACPM National Conference**, the first in-person ACPM conference since 2019, will identify the issues and developments that have taken hold and that could stay with us from this point forward. *"A Climate for Innovation – Exploring Sustainable Retirement"* will cover many areas of concern and highlight the benefits and consequences that are facing us for the foreseeable future.

# TUESDAY

## SEPTEMBER 27



### 7:30 AM – 4:00 PM

#### GOLF AT PIPPY PARK GOLF CLUB

Unforgettable? You bet. Located in Pippy Park and minutes from downtown St. John's, Admiral's Green offers a 360-degree panorama of North America's oldest city and miles of rugged coastline – the odds are that you'll see icebergs while walking the course. Opened in 1993, this Graham Cooke championship-designed course treats golfers to a challenge that Europeans have rated worthy of any British Open Championship. The course has hosted the Canadian Pro Tour, the Canadian Junior and Juvenile Nationals, and the Canadian Ladies National Championships – the course record remains at even par 71. The facility includes a licensed golfer's lounge in the fully-appointed Admiral's Green Clubhouse. Completed in 1997, the Admiral's Green Clubhouse combines an exceptional setting with an elegant and full service venue. It's a favourite location for hosting banquets, barbecues or meeting colleagues for lunch or a beverage.

**Registration includes green fees, travel to/from the hotel.**

### 12:00 PM – 8:00 PM

**REGISTRATION / INFORMATION DESK**  
DELTA HOTELS ST. JOHN'S CONFERENCE CENTRE

### Starting at 5:45 PM

**TRANSPORTATION TO THE ROOMS**  
DELTA HOTELS ST. JOHN'S CONFERENCE CENTRE

### 6:30 PM – 8:00 PM

#### WELCOME RECEPTION AT THE ROOMS

Immerse yourself in the culture of Newfoundland and Labrador! Join us at Newfoundland and Labrador's largest public cultural space where history, heritage and artistic expression come together. The Rooms is a portal to the many stories in the province and you'll find collections, exhibits and programs that tell stories and interpret the natural world through art, artifacts, archaeology, architecture and archival records. A remarkable feature of the skyline of historic St. John's, The Rooms unique design mirrors the fishing rooms where families came together to process their catch. This building, like the collections and exhibitions it houses, represents a tribute to our people and a place in which to preserve our history and culture for generations to come.

***We look forward to seeing you there!***

*\* All time noted is in Newfoundland time.*

TO REGISTER, GO TO **ACPM.COM**



# WEDNESDAY

## SEPTEMBER 28

**7:00 AM – 5:00 PM**

**REGISTRATION / INFORMATION DESK**  
**@ ST. JOHN'S CONFERENCE CENTRE**

**7:00 AM – 8:00 AM**

**BREAKFAST**

**8:15 AM – 8:30 AM**

**WELCOME AND OPENING REMARKS**

ROSS DUNLOP, *ACPM President*  
ANDREA PERRY, *Chair, ACPM National  
Conference Planning Committee*

**8:30 AM – 10:00 AM**

**OPENING PLENARY**

**EXITING THE PANDEMIC –  
EMERGING ECONOMIC TRENDS**

This session will include a discussion by two leading economic experts about broad economic trends emerging in Canada and worldwide as we exit the pandemic, including ESG, inflation and interest rates. This discussion will identify recent trends and explore what to expect in the coming years. Attendees will also benefit from insights from leading pension consulting firms into how these economic trends and forecasts do, and will, affect Canadian pension plans.

**SPEAKERS**

YUSUKE KHAN, *Mercer*  
WILLIAM ROBSON, *C.D. Howe Institute*  
RYAN JAMES BOYLE, *Northern Trust*  
**MODERATOR** › CARMEN STALTARI, *WTW*

**10:00 AM – 10:30 AM**

**REFRESHMENT BREAK / SPONSOR SHOWCASE**



**10:30 AM – 11:30 AM**

**CONCURRENT SESSIONS**

**WORKSHOP 1**

**How do plans move forward and implement  
ESG in their investment portfolios from  
a DB & DC perspective?**

The session will provide the perspectives from both a plan sponsor and investment consultant on how pension plans are incorporating ESG into their DB and DC pension plans starting from Board/Committee education and buy-in, policy development and implementation (manager selection, monitoring, reporting).

**SPEAKERS**

ROSS DUNLOP, *Ellement Consulting*  
MARC GAUTHIER, *Concordia University*  
**MODERATOR** › KATHRYN BUSH, *Blake, Cassels & Graydon LLP*

**WORKSHOP 2**

**Mental Health:  
Prioritizing Employee Wellness in the Workplace**

Recent realities have challenged workplaces to act quickly to support employee wellness. Benchmark data collected pre-pandemic and over the course of the last two years has found Canadian employee's mental health has stayed low since the onset of the public health crisis in 2020. Working under the assumption that the end of the pandemic won't mean the end of employee's struggling with their mental health, employers are now looking for new ways to better support employee wellness long-term. Learn about the challenges and the new approaches employers are taking to support mental health in the workplace.

**SPEAKERS**

PAULA ALLEN, *LifeWorks*  
CHERYL FULLERTON, *Corus Entertainment Inc.*  
**MODERATOR** › CHUCK BRUCE, *Provident<sup>10</sup>*;  
Chair of Mental Health Commission of Canada



# WEDNESDAY

## SEPTEMBER 28

### 11:45 AM – 12:15 PM

#### ACPM UPDATE and VOLUNTEER RECOGNITION AWARDS

### 12:15 PM – 2:00 PM

#### WEDNESDAY LUNCHEON AND SESSION Legal Perspectives 2022–23

Sit back and enjoy this highly informative session on current and future retirement legal issues, policy and legislation in Canada. The session will feature a panel of legal experts from across Canada who will provide their thoughts and expertise on how these legal developments will impact on retirement plan administration and governance in the years to come.

##### SPEAKERS

**MICHAEL WOLPERT**, *Fasken Martineau Dumoulin LLP*

**STEPHANIE KALINOWSKI**, *Hicks Morley*

**JULIEN RANGER**, *Osler, Hoskin & Harcourt LLP*

**MODERATOR** › **SUSAN NICKERSON**, *Torys LLP*



### 2:15 PM – 3:30 PM

#### PLENARY II

##### THE GREAT TRANSFORMATION

Cohorts of long-career employees simply leave the workforce. Others start a new job while they transition into retirement and might even benefit from collecting a pension and a salary. Will employers want or be able to retain experienced workers? Will they be able to attract and retain the new talent they need and how will they do that given pressures on labor markets? Retirement plans should be there to help, but are they doing their job and how do employees value them? This session will provide insight on how retirement plans have adapted to work realities in the last couple of years and how they should continue to adapt to the workforce of the future. Nothing is lost, nothing is created, everything is transformed.

##### SPEAKERS

**LINDA SILAS**, *Canadian Federation of Nurses Unions*

**KRIS TIERNEY**, *Human Resources Professionals Association*

**MODERATOR** › **DARCY CLARK**, *Normandin Beaudry*

### 3:30 PM – 4:00 PM

#### REFRESHMENT BREAK / SPONSOR SHOWCASE







## 4:00 PM – 5:00 PM CONCURRENT SESSIONS

### WORKSHOP 3

#### Pension Adequacy – Mind the gaps

Although pay equity legislation has recently come into effect at a federal level and already in place in several Canadian provinces, the gender pay gap persists. This leads to a troubling retirement income gap between men and women. However, other elements may also lead to different levels of income across an employee population which warrant review. This workshop will consider these challenges from a couple of different perspectives.

First, from a union vantage point and applying systemic solutions such as legislating card check certification to ensure fewer barriers to joining a union and expanding and facilitating collective bargaining in female-dominated jobs. And, secondly, from a plan sponsor perspective with considerations given to plan design and communication elements which may have unintended consequences.

#### SPEAKERS

**ADRIE NAYLOR**, *United Steelworkers (USW)*

**JEREMY PHILLIPS**, *Public Employees Benefits Agency*

**MODERATOR** › **NADINE TABET**, *Aon*

### WORKSHOP 4

#### The Future of Member Communications in a Digital First World

The world is becoming increasingly dependent on digital communications. The realities of the pandemic have enhanced and fast tracked the need for diversity in digital offerings. From virtual interactions to seamless integration of real time data and information, to new engagement platforms – stakeholders now expect faster and more sophisticated service offerings to support their decisions. How could AI be used as a communication tool to impact member behavior? Stakeholder diversity increasingly necessitates customized communications. At this session, hear about innovations and a vision for the future in member/stakeholder communications.

#### SPEAKERS

**ALIDA LADAK**, *Ontario Teachers' Pension Plan*

**CHRIS HEWITT**, *Sun Life*

**MODERATOR** › **JOY SAVAGE**, *fuse*



# WEDNESDAY

## SEPTEMBER 28

6:30 PM – 10:00 PM

## WEDNESDAY RECEPTION DINNER, AND POST-SOCIAL

As the first day of the conference wraps up, join us for a wonderful reception followed by a delicious dinner in a “*Jelly Bean Row*” environment at the **St. John's Convention Centre**.

Following dinner, get a taste of humour with **John Sheehan**, one of Newfoundland and Labrador's hottest rising stars. He has appeared at the Halifax Comedy Festival, St. John's Comedy Festival and, by his own admission, he has a patient wife, a mortgage and way too much CPR training (he's a Mr. January firefighter too).

After Wednesday night's entertainment, join us back at the Delta Hotel for a post-social for a nightcap.


**Thursday is coming up!**







**THURSDAY**  
**SEPTEMBER 29**



**10:15 AM – 11:15 AM**  
**CONCURRENT SESSIONS**

**7:00 AM – 4:30 PM**  
**REGISTRATION / INFORMATION DESK**  
**@ ST. JOHN'S CONFERENCE CENTRE**

**7:15 AM – 8:15 AM**  
**BREAKFAST**

**8:30 AM – 9:45 AM**  
**PLENARY III**

**PENSION TRENDS, PAST, PRESENT & FUTURE:  
HOW IS THE PENSION INDUSTRY CONTINUING  
TO PIVOT IN AN EVER-CHANGING WORLD?**

ACPM surveyed its members earlier this year as to what they consider to be the top developments in the environment in which pension plans operate. Which have had the most significant impact on pension plans in the recent past? What trends going forward will have the most significant impact in the pension industry? This plenary will reveal the top trends identified in the survey and we have invited three industry leading panelists to provide their views.

**SPEAKERS**

**MARY KATE ARCHIBALD**, *Eckler*

**ANDREW FUNG**, *Financial Services Regulatory Authority of Ontario (FSRA)*

**SIMONE REITZES**, *Medicus Pension Plan (Scotiabank)*

**MODERATOR** › **DERRICK JOHNSTONE**, *UBC*

**9:45 AM – 10:15 AM**  
**REFRESHMENT BREAK / SPONSOR SHOWCASE**

**WORKSHOP 5**

**Data Mining for Smarter Decision Making**

While data management and business intelligence is on the radar of many pension plan administrators and fund managers, in many cases, it is still only in their peripheral vision. Data mining will become a must-have skill in the pension industry and drive more evidence-based decision making. Sophisticated analytics of “Big Data” has already become more prevalent in various areas, such as social and digital media, member experience, operational efficiency and portfolio management. This workshop will explore the benefits of business intelligence as we hear from pension administrators.

**SPEAKERS**

**STEVEN FRENCH**, *Alberta Pensions Services Corporation (APS)*

**DIANA WINTERMANS**, *Healthcare of Ontario Pension Plan (HOOPP)*

**MODERATOR** › **SHERI WRIGHT**, *LAPP Corporation*

**WORKSHOP 6**

**Fiduciary Duties: Innovations in training to better equip Pension Plan Trustees and Administrators**

Pension plan Administrators and Boards need a broad knowledge base to manage their plans prudently and fulfill their fiduciary responsibilities. Depending on the plans' governance structures, some may also need to balance between interests of different stakeholders. We are living in an increasingly digital world where the paper handbooks and annual education sessions may no longer be adequate to equip trustees with the knowledge in a format they require. In order to overcome these challenges plans are innovating to deliver more effective training with customized curriculum that aligns with their plans' governance structure.

**SPEAKERS**

**ANDREW BONE**, *HRM Pension Plan*

**BITA JENAB**, *BC College and Public Service Pension Boards of Trustees*

**MODERATOR** › **LORI PARK**, *Mercer*



# THURSDAY

## SEPTEMBER 29

**11:45 AM – 1:15 PM**

### THURSDAY LUNCHEON AND SPEAKER

Enjoy a hearty lunch followed by our luncheon speaker:

**CHARLENE JOHNSON, CEO, - Energy NL**

Energy NL represents over 460 member organizations worldwide which are involved in, or benefit from, the energy industry of Newfoundland and Labrador. A key point of Charlene's presentation will be the transformative new project, *Bay Du Nord*, and how the province plans to transition from oil and gas to clean, green, energy. A timely topic and lots to learn!

**1:15 PM – 1:45 PM**

### SPONSOR SHOWCASE

**1:45 PM – 3:00 PM — CENTRE STAGE**

### CURIOUS ABOUT RETIREMENT INCOME!

The ACPM Executive Committee will be ready, willing and able to provide you with issues and answers. As the leading advocacy organization for retirement plan sponsors and administrators in Canada, we know that there are always issues and this is your time to provide input, pose questions and make recommendations to the ACPM Executive Committee. They are looking forward to it and your input helps us develop future policy positions!



*The ACPM Executive Committee is listening  
— make your voice heard!*

**3:00 PM – 3:30 PM**

### REFRESHMENT BREAK / SPONSOR SHOWCASE

**3:30 PM – 4:30 PM**

### SPOTLIGHT ON ... NIKOLAS BADMINTON



**NIKOLAS** is the Chief Futurist and Think Tank leader at **Futurist.com**, a Fellow of the Royal Society for Arts, Manufactures and Commerce (The RSA), and the futurist that works with the world's most impactful companies. He has worked with hundreds of world-leading companies, including NASA, Google, Microsoft, United Nations, United Way, Bayer, Corteva, Bank of Canada, American Express, AT&T, Thales International, Rolls Royce, Heineken, Procter & Gamble, Government of Canada, UK Home Office, and many more. Nikolas' new book – *'Facing Our Futures'* – provides the foundations for futures design and the tools to imagine new futures, create bolder visions, anticipate unforeseen risks, and strengthen strategic planning. Nikolas' thinking can also be seen in the opening chapter of the *'The Future Starts Now'*.

**4:30 PM – 4:45 PM**

### CLOSING CEREMONIES

**7:00 PM – 8:00 PM — GALA RECEPTION**

### DELTA HOTELS

### ST. JOHN'S CONFERENCE CENTRE!

Get ready for the home stretch! Before going home, join your colleagues at the Gala Reception for networking, conversation and relaxation. All delegates are welcome and one of the last opportunities to share some thoughts, laughs and plans with your industry friends and connections.

**8:00 PM – 10:15 PM**

### GALA DINNER AND ENTERTAINMENT

### SPIRIT OF NEWFOUNDLAND



The **Spirit of Newfoundland**, celebrating their 25<sup>th</sup> anniversary in 2022, will take you to a time when cod liver oil got us through the hard, hard times. Elsewhere in the world, the twenties were roaring, and the thirties were dirty. Here at home, Gerald S. Doyle was creating the beloved Newfoundland song books. Now, decades later, fans around the world are clapping their hands and stomping their feet to the music of Newfoundland. The icing on the cake for the Spirit of Newfoundland was to be named the winner of the 2017 Legend Award for the City of St. John's.

*Thank you to our generous sponsor > DESJARDINS*





## COMPANION PROGRAM

A complete Companion Program is available for non-delegates.

### The Companion Program includes:

- Conference Welcome Reception at The Rooms
- Two Hot Buffet Breakfasts
- Wednesday activity, *“Around the Bay”*
- Wednesday Reception, Dinner and Entertainment
- Thursday activity, *“Historic St. John’s and Cape Spear, with a Taste”*
- Thursday Gala Reception, Dinner and Entertainment

**WEDNESDAY, September 28, 2022 | 9:30 AM–4:30 PM**

### AROUND THE BAY

Join us for this excursion “Around the Bay” as we combine good fun, stories, and brilliant company while visiting a local brewery and the Newfoundland Distillery Company. This is a great adventure for everyone who simply appreciate a “time” and the many smiles we’ll share. A fun and informative introduction to Newfoundland’s craft beer and liquor and how its quickly woven its way into our social fabric. Each venue is located in resilient, coastal communities whose beautiful homes and architectural structures depict an era of wealth and intrigue that is as fascinating as the natural beauty surrounding them.

**Lunch is included.**

**THURSDAY, September 29, 2022 | 10:30 AM–3:30 PM**

### HISTORIC ST. JOHN’S AND CAPE SPEAR, with a Taste

Become acquainted with the city of St. John’s and its surroundings, including Cape Spear, the most Easterly point in North America. This is the oldest colonized region in the new world and your local guide will regale you with its steeped history, legends & lore – all flavored with their personal anecdotes and good humor from



which Newfoundlanders are so famous. Enjoy the brilliant vistas from Cabot Tower and Signal Hill, one of the most recognizable skylines in Canada. Walk through a cliffside World War II gun battery, watch for whales and seabirds and visit the oldest standing lighthouse in North America. Other stops include Quidi Vidi Village, Jelly Bean Row, Government House, the Roman Catholic Basilica

and an orientation of the shops and restaurants of the downtown core. Lunch and a beer tasting will be arranged at Yellowbelly Brewery. On our adventure, we will also visit Newman’s Wine Vault to pair their famous ‘Port’ with chocolate from the Newfoundland Chocolate Company and the Screech Room where who will introduce us to a variety of Newfoundland’s wild berries and rum cakes.

**Lunch is included.**

## ADDITIONAL INFORMATION

**CONFERENCE HOTEL** — The 2022 ACPM National Conference host hotel is the Delta Hotels St. John’s Conference Centre in St. John’s, NL. All registration and conference sessions will take place at the hotel. Delegates are responsible for making their own arrangements. Please visit the ACPM Conference website ([acpm.com](http://acpm.com)) for complete hotel details and information on guestroom reservations.

**ATTIRE** — The dress code for the conference is business casual. The Wednesday night events are casual. Business/dinner attire is optional but recommended for the Thursday Gala events.

**CONFERENCE ID** — Conference ID Badges must be worn to all Conference-related activities. ID Badges will be required for entry to all business and social activities for Delegates and Companions. Please do not lend your ID Badge to anyone. If your ID Badge is misplaced, please proceed to Registration as soon as possible.

### DIETARY CONCERNS AND DELEGATE LUNCHEONS

Any dietary concern must be included on the registration form during registration. Any dietary concerns reported during the conference might not be accommodated. Delegate luncheons are part of the general conference program and are available only to registered Delegates.

**CONTINUING EDUCATION** — ACPM will issue certificates of attendance for all sessions that may be submitted by delegates for CPD hours. For additional information, please contact your professional association.

### PLENARY SESSIONS AND WORKSHOPS

We have an informative and valuable program planned for you. To stay on time, and in respect for speakers and presenters, we request that you arrive at Plenary and Workshop sessions and that you take your seat several minutes in advance of the opening remarks. You may attend the Workshop of your choice; no pre-registration is necessary.

**MOBILE PHONES** — As a courtesy to other conference attendees and speakers, we request that you turn off (or switch to silent mode) all personal communication devices during the conference sessions. Mobile phone calls should be taken outside of the conference session rooms and dining rooms.

**CANCELLATION POLICY** — A full refund on the conference portion of the fee, excluding golf and other activity fees is available for cancellations that are received *in writing* no later than **Friday, July 22, 2022**. Cancellations received in writing between **July 23 and August 19** will result in a 50% refund of the conference registration fee, excluding golf fee. **No refund for any component of the conference is possible after Friday, August 19.** Substitution of a delegate is permitted; however, such arrangements must be initiated by the originally registered Delegate.

**ACPM assumes no liability for changes in program content, social activities, venue, event dates or session times.**

Please note that the Hotel has its own cancellation policy for guestrooms which is independent of ACPM’s policy and is as follows: Cancellations received 48 hours prior to arrival will be refunded fully. Cancellations received less than 48 hours prior to arrival will incur a cancellation fee equivalent to a one-night stay. Please contact the Hotel directly to request your cancellation if you have made the original booking.

## A SPECIAL THANK YOU TO OUR VALUED SPONSORS

We wish to express our sincere appreciation to all of our Sponsors. It is with their valuable support that ACPM has consistently been able to offer exceptional programming for conference delegates year after year. Please take the time to meet our Sponsor representatives throughout the conference and feel free to join us in saying, *“Thank you for making it happen!”*

**SPECIAL THANK YOU TO  
OUR DIAMOND SPONSOR ➤**

