



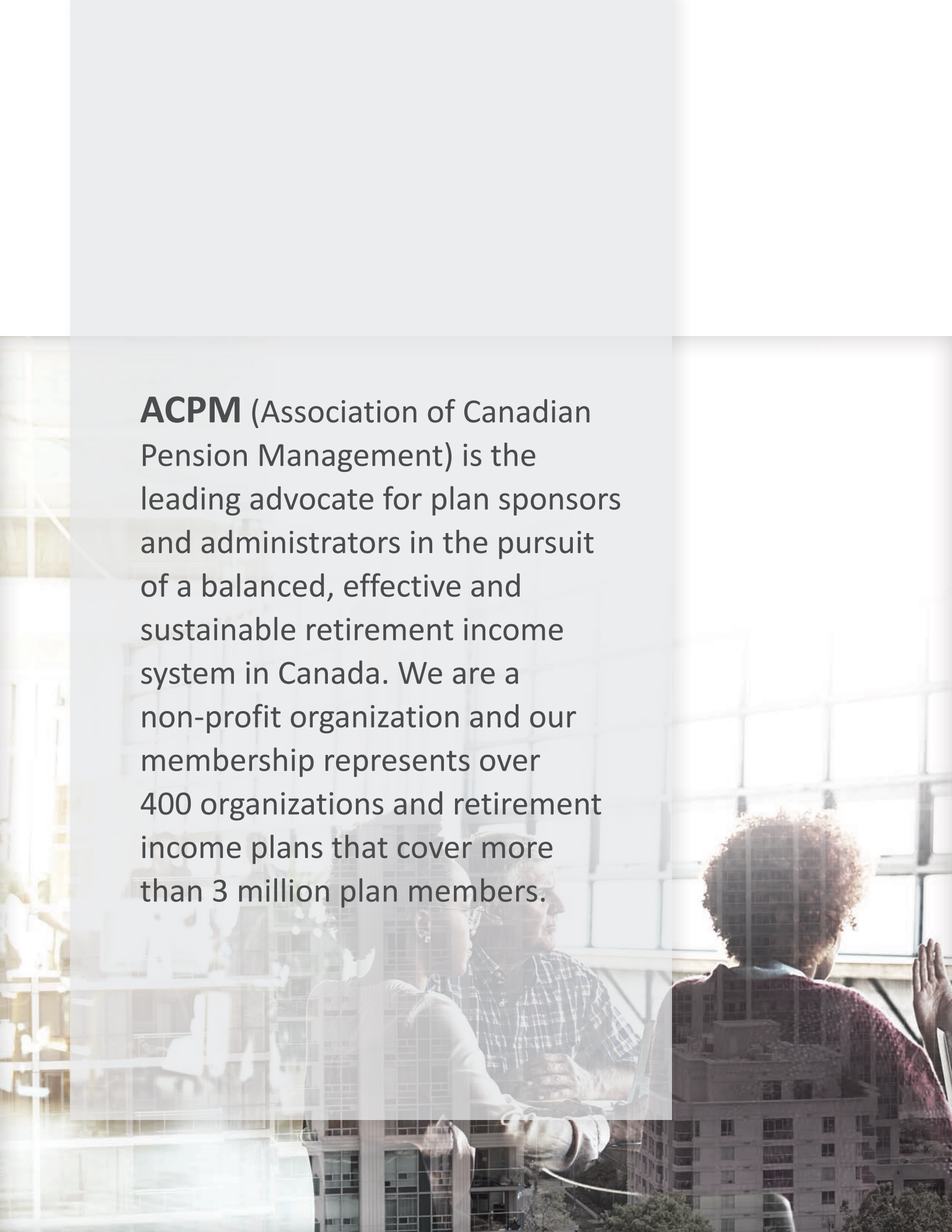
# ACPM ANNUAL REPORT 2017|18



ACPM | ACARR

*The Voice of the Retirement  
Income Industry.*



A group of people, including a woman in a white top and a man in a plaid shirt, are sitting on a balcony overlooking a city. A woman with curly hair is seen from behind, looking out at the city. The scene is brightly lit, suggesting a sunny day. A large window is visible in the background, and the overall atmosphere is bright and open.

**ACPM** (Association of Canadian Pension Management) is the leading advocate for plan sponsors and administrators in the pursuit of a balanced, effective and sustainable retirement income system in Canada. We are a non-profit organization and our membership represents over 400 organizations and retirement income plans that cover more than 3 million plan members.

# TABLE OF CONTENTS

Vision, Mission and Guiding Policy Principles	2
Values	3
Message from the Chair	4
National Board of Directors 2017   18	6
Board Committees	8
Advocacy	10
Report of the Audit & Finance Committee	11
National Committees	12
Federal Council	13
National Council	14
Regional Councils	16
Additional Activities	18
Memberships	20
Volunteer Recognition Awards	22
Executive Members	23
2017 National Conference Sponsors	24
National Office	25

# Vision, Mission and Guiding Policy Principles

## VISION

The leading advocate for plan sponsors and administrators in the pursuit of a balanced, effective and sustainable retirement income system in Canada.

## MISSION

ACPM enlists the talent and resources of its national volunteer member base to provide thought leadership on behalf of Canadian plan sponsors, administrators and their service providers, in retirement income system policy and advocacy.

## GUIDING POLICY PRINCIPLES

ACPM believes in the following principles as the basis for its policy development in support of an effective and sustainable Canadian retirement income system:

### **Diversification through Voluntary / Mandatory and Public / Private Options**

Canada's retirement income system should be comprised of an appropriate mix of voluntary workplace and individual savings arrangements ("Third Pillar") and mandatory public programs ("First and Second Pillar").

### **Empowering Choice in Coverage**

Third Pillar arrangements should be encouraged and play a meaningful, ongoing role in Canada's retirement income system.

### **Adequacy, Security and Affordability**

The components of Canada's retirement income system should ensure a healthy balance between these three objectives to enable Canadians to receive adequate and secure retirement incomes at a reasonable cost for members and employers.

### **Innovation in Plan Design**

Canada's retirement income system should encourage and permit innovation in plan design in all three Pillars.

### **Adaptability**

Canada's retirement income system should be able to adapt to changing circumstances without the need for comprehensive legislative change.

### **Harmonization**

Canada's pension legislation should always strive for better harmonization.

### **Clarity and Transparency**

Legislation, regulations and retirement income arrangements should be clearly defined and pension plan beneficiaries should be appropriately informed of risks, costs and benefits.

### **Good Governance**

Excellence in governance and administration in the retirement income system.



# Values

## VALUES

### **Member Focus**

Understanding ACPM members' views, needs and interests.

### **Talent and Diversity**

The central role played by our primary asset: skilled individuals volunteering their professional expertise, while striving for diversity reflective of our membership and Canadian society.

### **Thoughtful Consideration**

Balanced consideration of other stakeholders' interests in the development of ACPM's own policy positions.

### **Resource Management**

Prudent investment of our human and financial resources in ways that best support the objectives of our Association and its members.

### **Accountability**

Accountability and clarity of purpose so that everyone involved with ACPM knows what is expected of them and others.



# Message from the Chair

CANADA'S LEADING  
RETIREMENT  
INDUSTRY  
ADVOCATE



**MICHEL JALBERT**  
Chair, ACPM Board of Directors

It is with mixed feelings that I am preparing my last message for the annual report as my two-year term as Board Chair will come to an end in September 2018. Because of the hard work, devotion and passion of hundreds of volunteers and our dedicated staff, I am very proud to leave my position of Chair of the Board of Directors with an organization which has accomplished so much in terms of raising its industry profile and improving its financial situation.

The most important responsibility of any Board of Directors is to hire a Chief Executive Officer of the organization they oversee. Thus, it is my pleasure to congratulate Mr. Ric Marrero who has been confirmed as our new CEO. The Board has followed a very disciplined and rigorous process and came to the unanimous decision of confirming Ric in the position. His professionalism and dedication demonstrated throughout his interim tenure facilitated our decision.

*Over the last year, ACPM has no doubt reinforced its position as the leading advocate for Canada's pension plan sponsors, administrators and related service providers. Not only Government officials and regulators are being influenced by our positions but they are now proactively reaching out to us ahead of disclosing their positions.*

Numerous pension-related issues have been debated over the last year with some having a regional scope, whilst others had national reach. In fact, throughout the year, ACPM has been active in advocating across Canada for an effective

and sustainable retirement income system through the lens of plan sponsors and administrators' with an impressive number of submissions totalling 12 to the federal and provincial governments and regulators. To name a few, we were very proactive in providing our position on Ontario Solvency Reform, Québec Bill 176 - controversial legislation limiting pension plan disparity clauses - and Bill C-27 which is designed to encourage the creation of Target Benefit Plans for Federally registered and regulated pension plans. More importantly, I am proud to report that ACPM is now also collaborating with other organizations such as PIAC, CAPSA, CIA, CLHIA and others on issues like changes to the Income Tax Act and engaging a dialogue on longevity risk; these types of coalitions allow us to reach a critical mass, thus augmenting our chances of success in introducing changes to the Canadian retirement system.

All these activities have resulted from the hard work of our many volunteers from the National Policy Committee and the Regional Councils. Indeed, their commitment and expertise allow ACPM to develop policy positions for needed reforms on a regional or a national level, which are persuasive and compelling.

One of our key objectives is to foster education and thought leadership initiatives to ensure that the pension industry remains alive and dynamic. Initiatives such as our Retirement Literacy program and the publication of two editions of *The Observer* – with articles from 22 retirement security contributors – have been instrumental in achieving this objective.

Our National Conference remains a flagship event for our organization. I believe our conference is one of the best in the industry providing senior pension professionals an excellent opportunity to network and learn more from well-seasoned speakers about a broad range of leading edge pension matters.

Our 2017 edition in Banff, Alberta, was an outstanding success attracting more than 350 delegates, including a high

proportion of plan sponsors and administrators. The 2018 edition will take place in Québec City and will also be a great success as registrations are now reaching our maximum capacity. In fact, I encourage all pension professionals to participate and contribute to these events. It goes without saying that the support of our loyal sponsors is critical in making these events a success and I would like to take this opportunity to thank them for their support.

One of ACPM's key strengths is its national reach. This is accomplished in large part through the Regional Councils that are active in all parts of Canada, including the Federal Council. The Councils are an important point of contact for our memberships, policymakers, regulators, and other stakeholders. This past year, the various Councils have organized 20 events across the country with the participation of more than 1,300 ACPM members and other stakeholders.

It is important to recognize and thank all our volunteers – those on the Board, National Committees, and our various Regional Councils, amongst others. We proudly enlist the talent and resources of such volunteers that are the heart and soul of our organization in pursuit of ACPM's larger objectives – an effective and sustainable retirement income system in Canada. It is also critical to recognize the exceptional contribution of our volunteers. Consequently, the following 2017 awards were given to the following individuals:

**Mr. Chris Brown** – *Don Ireland Award for Exceptional Volunteerism*

**Mr. Michel St. Germain** – *ACPM Industry Award*

**Mr. Serge Charbonneau** – *Regional Council Award*

Lastly, I would like to recognize our national office staff, all of whom serve our organization with dedication and efficiency. Oftentimes, they do work in the shadows but their contribution is essential to the success of the organization.

An organization such as ACPM is ultimately comprised of our members. I would like to recognize and thank those organizations who have made a substantial commitment to ACPM as Executive Members. I am delighted to highlight the great work of our Executive Membership Engagement Committee which has been instrumental in recruiting several

new members bringing our total to 36 Executive Members. This wider group of Executive Members increases the pool of potential volunteers providing vitality to our organization and allows us to draw on the expertise of our impressive group of pension leaders across the country. Each member is ultimately the best ambassador for ACPM.

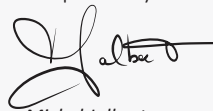
In September 2018, my term as Chair will come to an end and it will be assumed by an exceptional contributor to ACPM, Ms. Susan Nickerson. I am confident that she will take the reigns of our organization with the same passion and dedication she has always showcased over the years. To address changing demographics and by facing a challenging investment landscape, the pension industry will need to tackle important challenges in the years to come. It will require all stakeholders, including policy makers, regulators, service providers and plan sponsors to be nimble and innovative in order to adjust to this changing environment. Amongst other things, the decumulation challenge is just starting to unfold and our income tax rules will require important changes to remain relevant.

I remain convinced that ACPM is well-positioned to contribute positively, ultimately leading to a better retirement system for Canadians.

It has been a tremendous pleasure to serve as Chair along so many dedicated and accomplished pension industry professionals. I am once again counting on their contributions to continue our important work and to get involved in our organization.

**We have just embarked on an exciting journey.**

Respectfully submitted,



*Michel Jalbert*  
Chair, ACPM Board of Directors

# National Board of Directors 2017|18

## BOARD OFFICERS

### **MICHEL JALBERT**

Chair of the Board  
Montréal, QC

Executive Vice-President, Business Development & Client Partnerships  
*Addenda Capital*



### **SUSAN NICKERSON**

Vice-Chair of the Board  
Toronto, ON

Partner  
*Torys LLP*



### **ROSS DUNLOP**

Secretary  
Winnipeg, MB

Partner  
*Ellement Consulting*







**CHRIS BROWN, Director**  
**Edmonton, AB**  
 President & CEO  
*Alberta Local Authorities  
 Pension Plan Corp.*



**KENNETH BURNS, Director**  
**Vancouver, BC**  
 Partner  
*Lawson Lundell LLP*



**DEREK DOBSON, Director**  
**Toronto, ON**  
 CEO  
*CAAT Pension Plan*



**CAROLE FIELD, Director**  
**Calgary, AB**  
 VP of Human Resources (2017)  
*ATCO Group*



**ROSALIND GILBERT, Director**  
**Vancouver, BC**  
 Associate Partner  
*Aon*



**JOHN HALLETT, Director**  
**Regina, SK**  
 Retirement Strategist,  
 Group Retirement Services  
*Sun Life Financial*



**PIERRE LAVIGNE, Director**  
**Montréal, QC**



**ELEANOR MARSHALL, Director**  
**Saint John, NB**  
 Vice-President, Pension & Benefits  
*Bell Canada*



**ANDREA PERRY, Director**  
**Halifax, NS**  
 Senior Client Relationship Manager  
*Northern Trust*



**PETER SHENA, Director**  
**Toronto, ON**  
 EVP & Chief Pension Officer  
*Ontario Pension Board*

# Board Committees

## EXECUTIVE COMMITTEE

The Executive Committee co-ordinates and leads ACPM's advocacy efforts and government relations strategy in respect to policy positions and priorities developed by ACPM.

In conjunction with the National Policy Committee, the National Council and the Regional Councils, the Executive Committee develops strategic initiatives in support of the advocacy goals of the organization.

### CHAIR

#### **MICHEL JALBERT**

Addenda Capital

### MEMBERS

#### **CHRIS BROWN**

Alberta Local Authorities Pension Plan Corp.

#### **KATHRYN BUSH**

Blake, Cassel & Graydon LLP

#### **SUSAN NICKERSON**

Torys LLP

#### **JEFF NORTON**

TRAF

#### **TODD SAULNIER**

Mercer

## AUDIT & FINANCE COMMITTEE

The Audit & Finance Committee oversees the reliability of financial reporting, the effectiveness of internal controls and serves as a communication forum between the Board and the external auditors.

The Committee also reviews the Association's financial policies and makes recommendations as required.

### CHAIR

#### **PIERRE LAVIGNE**

### MEMBERS

#### **ELEANOR MARSHALL**

Bell Canada

#### **KEN BURNS**

Lawson Lundell LLP

#### **ANDREA PERRY**

Northern Trust

#### **MICHEL JALBERT, Chair of the Board, (Ex-officio)**

Addenda Capital



## GOVERNANCE & NOMINATING COMMITTEE

The Governance & Nominating Committee makes recommendations to the Board on governance matters including the delegation of authority, Board effectiveness and governance policies.

The Committee also conducts the search process for election to the Board and makes recommendations with respect to Board candidates as well as candidates to chair ACPM National Committees and Regional and Federal Councils.

### CHAIR

#### ROSS DUNLOP

Ellement Consulting

### MEMBERS

#### CHRIS BROWN

Alberta Local Authorities Pension Plan Corp.

#### ROSALIND GILBERT

Aon

#### PETER SHENA

Ontario Pension Board

#### MICHEL JALBERT, Chair of the Board, (Ex-officio)

Addenda Capital

## HUMAN RESOURCES COMMITTEE

The Human Resources Committee is responsible for recommendations to the Board regarding the annual performance objectives for the Chief Executive Officer.

In addition, and in consultation with the Chief Executive Officer, the Committee is responsible for the review and recommendations to the ACPM compensation and benefit policy.

### CHAIR

#### CAROLE FIELD

ATCO Group (2017)

### MEMBERS

#### DEREK DOBSON

CAAT Pension Plan

#### JOHN HALLETT

Sun Life Financial

#### SUSAN NICKERSON

Torys LLP

#### MICHEL JALBERT, Chair of the Board, (Ex-officio)

Addenda Capital

# Advocacy

For over four decades, ACPM has grown to become Canada's leading advocacy body for the retirement income industry. With committed volunteer experts in their respective fields, we assess and comment on proposed legislation related to pension and retirement income issues at the federal and provincial levels.

In conjunction with the ACPM National Policy Committee, submissions are prepared and presented to governments, working commissions or panels that gather input prior to making changes in legislation. In addition, ACPM crafts position papers on specific subjects of interest, which are then released to the retirement income industry, governments and the general public.

We work to develop strong and mutually productive relationships with governments and their respective regulators at the federal and provincial levels. It is through these strong relationships that we can effectively bring about positive change on behalf of our members and the retirement income industry in pursuit of an equitable and sustainable retirement income system.

## ACPM PAPER

- » Decumulation, The Next Critical Frontier: Improvements for Defined Contribution and Capital Accumulation Plans

## FEDERAL and PROVINCIAL GOVERNMENT SUBMISSIONS

- » Amending PBSR and PRPP Regulations – Letters of Credit
- » Submission on Ontario Budget Bill 127 – Expanded powers for Ontario Superintendent
- » Ontario Regulation 909 of the PBA – Special Orders by the Superintendent
- » Ontario Regulation 909 of the PBA – Administrative Penalties
- » Québec Regulation respecting supplemental pension plans
- » Commentaires relatifs au projet de Règlement modifiant le Règlement sur les régimes complémentaires de retraite (le « Projet de règlement »)
- » Alberta Government re: EPPA Update 17-01
- » Nova Scotia Funding Reform Consultation
- » Reform of Ontario's Funding Rules for Defined Benefit Pension Plans

## AGENCY SUBMISSIONS

- » Accounting Standards Board (AcSB) – Hybrid Pension Plans
- » CAPSA Proposed Changes to Funding and Asset Allocation Rules – Multi-jurisdictional Pension Plans



# Report of the Audit & Finance Committee

## FOR THE YEAR ENDING JANUARY 31, 2018

Financial highlights include the following:

1. Net Assets at January 31, 2018, were \$607,148 compared to \$553,241 at the same time the previous year.
2. The Association recorded an operating surplus of \$65,016.
3. Revenues came in at \$1,475,893 compared to \$1,257,390 the previous year. This increase is primarily due to a combination of increased revenues from membership and the National Conference.
4. Expenses totalled \$1,410,877 as compared to \$1,257,761 the previous year.
5. At year-end, ACPM had \$613,784 (including interest) in investments. This meets with ACPM Reserve policy, which ensures that sufficient funds are set aside to allow for fluctuations in revenues and expenditures and unforeseen contingencies.

Providing adequate resources to support the ongoing cost of ACPM operations is critical for ACPM to serve its members and advocate for an effective and sustainable Canadian retirement income system.

**NOTE:** ACPM's audited financial statements for the year 2017–18 are available at [www.acpm.com](http://www.acpm.com) in the "Members Only" section.

## COMMITTEE MEMBERS

**PIERRE LAVIGNE**, Chair

**ELEANOR MARSHALL**

Bell Canada

**KEN BURNS**

Lawson Lundell LLP

**ANDREA PERRY**

Northern Trust

**MICHEL JALBERT**, Chair of the Board  
(Ex-officio)

Addenda Capital

# National Committees

## NATIONAL POLICY COMMITTEE (NPC)

The NPC has a broad membership consisting of experts that are drawn from different industry segments and all regions of Canada whose members have a strong interest in retirement income policy. The Committee is charged with the responsibility of identifying issues which can affect Canada's retirement income system and to develop and propose policy positions that are consistent with ACPM's Vision, Mission, Goals and Guiding Principles.

**CHAIR KATHRYN BUSH** — Blake, Cassels & Graydon LLP  
**VICE-CHAIR TODD SAULNIER** — Mercer

## NATIONAL CONFERENCE PLANNING COMMITTEE (NCPC)

The NCPC consists of volunteer members who have been drawn from across the country. The Committee identifies major retirement income issues, develops the conference agenda and secures the necessary individuals and expertise that will result in a rewarding and informative experience for all conference delegates.

**CHAIR CHRIS BROWN** — Alberta Local Authorities Pension Plan  
**VICE-CHAIR F. HUBERT TREMBLAY** — Mercer

## EDITORIAL COMMITTEE (EDCOM)

EDCOM acts on behalf of ACPM in providing guidance in the development and publication of *The Observer*, in the content of ACPM webinars and in the content of other communications vehicles as required. The Committee is guided by the goals of ACPM, keeping the retirement income industry informed of relevant issues, promoting ACPM as the “voice of the Canadian retirement income industry” and encouraging participation for thought leadership on relevant topics.

**CHAIR PAULA POTTER** — Saskatchewan Healthcare Employees' Pension Plan  
**VICE-CHAIR VACANT**

## EXECUTIVE MEMBERSHIP

### ENGAGEMENT COMMITTEE (EMEC)

EMEC consists of representatives from the retirement income industry that work with other internal resources (Board of Directors, National Committees, Regional Councils etc.) to broaden the reach for corporate participation to support the ongoing efforts of ACPM. The committee manages the Executive Membership Program which demonstrates clear value for its members and fosters their growth and retention.

**CHAIR AL KIEL** — Morneau Shepell  
**VICE-CHAIR JOE CONNOLLY** — Morneau Shepell

### STRATEGIC INITIATIVES COMMITTEE (SIC)

This committee consists of members who have in-depth knowledge of retirement income issues, the skills necessary to spearhead major projects and provide support to ACPM in the overall achievement of the Association's short and long term goals and objectives. The committee is responsible for the ACPM Retirement Literacy Program and works with the National Office to complete various organizational projects and initiatives.

**CHAIR ANDREA BOCTOR** — Stikeman Elliott LLP  
**VICE-CHAIR PIERRE LAVIGNE**

#### NOTE:

*In accordance with the By-laws, the Chair of the Board and the ACPM CEO are ex-officio members of all National Committees and Councils.*

# Federal Council

The **FEDERAL COUNCIL** is comprised primarily of federally regulated pension plans. Their role is to identify relevant issues and to develop an ongoing relationship with the Office of the Superintendent of Financial Institutions (OSFI). Federally regulated plans include the areas of telecommunications, interprovincial ground transportation, airlines, banks, insurance companies, Crown corporations and entities and indigenous pension plans.

## **CHAIR**

**DUNCAN BURRILL**

CBC Pension Fund

## **VICE-CHAIR**

**ELEANOR MARSHALL**

Bell Canada

## **PARTICIPATING ORGANIZATIONS**

**AIR CANADA**

**BANK OF CANADA**

**CANADA MORTGAGE &  
HOUSING CORPORATION**

**CANADA POST**

**CANADIAN PACIFIC**

**CN RAILWAYS**

**ENBRIDGE**

**FARM CREDIT CANADA**

**HALIFAX PORT ILA/HEA  
PENSION PLAN**

**MERCER**

**NATIONAL BANK OF CANADA**

**RBA GROUPE FINANCIER**

**SCOTIABANK**

**STIKEMAN ELLIOTT LLP**

**TELUS**

**TORYS LLP**



# National Council

The National Council acts as a 'Council of Councils' and provides a forum for ideas and issues and matters of common concern. The National Council facilitates communications and the regular flow of information back and forth between the Regional Councils and other organizational groups, thus assisting in the coordination of ACPM's national advocacy efforts.

## MEMBERS

**MICHEL JALBERT**, Chair of the Board  
Addenda Capital

**KATHRYN BUSH**, Chair, National Policy Committee  
Blakes LLP







## British Columbia Regional Council (BCRC)

**DERRICK JOHNSTONE**, Chair  
IWA-Forest Industry Pension Plan

**MAXINE SMALLEY**, Vice-Chair  
Connor, Clark & Lunn

## Alberta Regional Council (ABRC)

**MICHAEL WOLPERT**, Chair  
Lawson Lundell LLP

**JULIE JOYAL**, Vice-Chair  
Alberta Teachers' Retirement Fund

## Prairie Regional Council (PRC)

**TIM MCGORMAN**, Chair  
Ellement Consulting

**DALE MARKEWICH**, Vice-Chair  
SHEPP

## Ontario Regional Council (ONRC)

**STEPHANIE KALINOWSKI**, Chair  
Hicks Morley LLP

**DANELLE PARKINSON**, Vice-Chair  
Ontario Pension Board

## Québec Regional Council (CRQ) *(Le Conseil du Québec)*

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

**PIERRE LAVIGNE**, Vice-Chair

## Atlantic Regional Council (ARC)

**SARAH SISSONS**, Chair  
Morneau Shepell

**KIERSTEN AMOS**, Vice-Chair  
McInnes Cooper

## Federal Council (FC)

**DUNCAN BURRILL**, Chair  
CBC Pension Fund

**ELEANOR MARSHALL**, Vice-Chair  
Bell Canada

# Regional Councils

## 2017–18 REGIONAL COUNCIL ACTIVITIES

ACPM has six Regional Councils (Atlantic, Québec, Ontario, Prairie, Alberta, British Columbia).

The Councils provide information sessions for retirement income stakeholders and encourage ACPM Membership.

Council Chairs sit on the National Policy Committee (NPC) and actively assist the NPC and the Executive Committee in relevant advocacy work with governments.

### ACPM National Session

In addition to the various information sessions, there is a National Session series that occurs in eight cities across the country and are produced in conjunction with the Regional Councils. The 2017 National Session entitled "**Navigating the Maze – The Income Tax Act and Investment Uncertainty**" featured two topics that are of continuing concern to retirement income professionals:

- » Increasing Support for Retirement Savings:  
Proposals to Modernize Canadian Tax Rules  
Applicable to Registered Plans
- » Governance of Pension Investment Decision Making  
in an Environment of Lower Expected Future Returns

### British Columbia Regional Council

**"The Good, the Bad and the Ugly of Making Pension Investment Decisions"**

**Featured:**

**Peter Muldowney** – Connor, Clark & Lunn Financial Group

**Marc Williams** – Leith Wheeler Investment Counsel Ltd.

**Moderator: Jaime Omichinski** – Willis Towers Watson

**"In the Age of Governance"**

**Featured:**

**Michael Peters** – FICOM

**Ken Burns** – Lawson Lundell LLP

**Moderator: Derrick Johnstone** – IWA-Forest Industry Pension Plan

**"The ABCs of ESGs"**

**Featured:**

**Shawn Hatch** – Hatch Law

**Gary Yee** – Municipal Pension Board of Trustees

**Bryan Thomson** – bclMC

**Moderator: Perry Teperson** – Leith Wheeler Investment Counsel Ltd.

### Alberta Regional Council

**"Managing Pension Risk: A Global Perspective and Local Case Study"**

**Featured:**

**Robert Vandersanden** – Aon

**Shelby Robertson** – Repsol Oil & Gas Canada Inc.

**Moderator: Dea Napen** – Mercer



## Prairie Regional Council

**"CPP Reform: What Are The Implications and Impacts on Pension Plans, Employers and People?"**

**Featured:**

**Brad Prokop** – Teachers' Retirement Allowances Fund

**Diane Panting** – Encouraging Works

**Moderator: Tim McGorman** – Ellement Consulting

## Ontario Regional Council

**"The CPP Enhancement. What does the future hold?"**

**Featured:**

**Allan Shapira** – Aon

**Stephanie J. Kalinowski** – Hicks Morley Hamilton

Stewart Storie LLP

**Moderator: Karen Burnett** – Willis Towers Watson

**"Information & Networking Session on Ontario Funding Reform"**

**Featured:**

**Kathy Bush** – Blake, Cassels & Graydon LLP

**Jeff Kissack** – Willis Towers Watson

**Moderator: Danelle Parkinson** – Ontario Pension Board

### **Annual Golf Tournament**

An annual professional networking event that occurred at the 2017 venue of the Piper's Heath Golf Club.

## Le Conseil du Québec

**« Placement des caisses de retraite en 2017 : conseils d'experts inclus »**

**Featured:**

**Jacques Demers** – CDPQ

**Louis Beaulieu** – Desjardins

**Gilles Chouinard** – ABRPPVM

**Gilles Horrobin** – STM

**Moderator: Emmanuel Matte**, CFA, FSA, FICA

## Atlantic Regional Council

**"Beer and Pensions: The New CPP and the Role of Government Sponsored Programs in Our Retirement"**

**Featured:**

**David Hughes** – Mercer (Canada) Limited

**Wes Sheridan** – Morneau Shepell

**Peter Freeman** – Investors Group

**Moderator: Sarah Sissons** – Morneau Shepell

**"Avoiding the Landmines: Strategies to Manage Pension Plan Risk"**

**Featured:**

**Calvin Jordan** – Nova Scotia Health Employees' Pension Plan

**Leonard Lee-White** – Government of New Brunswick

**Nikki Keating** – Bell Canada

**Neil Duffy** – Great-West Life

**Moderator: Jim Power** – Sun Life Financial

# Additional Activities

## WEBINAR PROGRAM

This expanded ACPM program continued to feature timely topics of interest for the retirement income industry. We are looking forward to even more webinar opportunities in the years ahead.

### ***"Blockchain: Innovation and Opportunity"***

**Presented by:**

**Zabrina Smith** – Northern Trust

### ***"Expected investment returns and risk management in a post solvency-test world?"***

**Presented by:**

**Ben Homsy** – Leith Wheeler Investment Counsel Ltd.

**Marc Williams** – Leith Wheeler Investment Counsel Ltd.

### ***"Why Pension Communications Matter"***

**Presented by:**

**Alyssa Hodder** – Eckler Ltd.

**Jon Marin** – Osler, Hoskin & Harcourt LLP

## RETIREMENT LITERACY WEBSITE

**(<http://retirementliteracy.acpm.com/>)**

Going into its third year, the Retirement Literacy website continues to provide Canadians with information that is important to their retirement plans.

With several quizzes that cover Government Programs, Workplace Retirement Savings Plans, Individual Savings Plans, the Canada Pension Plan Investment Board and CPP Benefits. Links to additional information is available in more detail at the convenience of the website visitor.

The ACPM Retirement Literacy Initiative was made possible through the generosity of the project sponsors listed below.





## THE OBSERVER

(<http://www.acpm.com/ACPM/The-Observer/2018-Issue-1.aspx>)

The ACPM eNewsletter for the retirement income industry provides useful information covering ACPM programs and events, includes articles from experienced retirement income professionals and lists numerous legal and regulatory updates during the course of the year.

Thank you to the advertisers that made "The Observer" a reality.



## CAREERPOST

This program provides an opportunity to Employers, Recruiters and Career Seekers to access an exclusive group of senior qualified pension and retirement income industry professionals. Visit the ACPM website for details.

## eBLAST PROGRAM

This promotional opportunity allows organizations to deliver a customized electronic message to retirement income professionals across the country. The contact list is approximately 6,500 individuals and includes plan sponsors, administrators and service providers.

# Membership

ACPM Members provide the experience and guidance that supports our work in the pursuit of an effective and sustainable Canadian retirement income system. We are committed to an innovative and responsive Canadian retirement income system that continues to be one of the best in the world.

## **ACPM Membership represents:**

Plan Sponsors, Administrators and Trustees; Actuarial, Consulting and Accounting Firms; Investment and Legal Firms; Custodians and Record Keepers; Labour Organizations; HR Professionals; Government Ministries and their Regulatory Bodies; Professional and Industry Associations.

- » Canada’s leading advocacy body representing plan sponsors and administrators
- » National and regional expertise and representation
- » Events feature high-level information sessions and industry experts
- » Responses to federal, provincial and territorial governments cover many topics including:
  - Defined Benefit Plan Funding
  - Capital Accumulation Plans and Decumulation Issues
  - Target Benefit Plans
  - Solvency Funding
  - Pooled Registered Pension Plans
  - Mandatory Public Pension Plans
  - Environmental, Social and Governance policies
  - Financial Literacy
  - Plan Conversions
  - Many other important federal and provincial topics

## **MEMBERSHIP BENEFITS**

- » “**CONTACT**”, the online monthly newsletter that keeps you up-to-date
- » Special information in the “Members Only” section on the ACPM website
- » Valuable information on the latest retirement income developments
- » Networking opportunities with senior management colleagues
- » Eligibility to participate on ACPM Regional Councils and National Committees
- » Voting and nomination rights for the Board of Directors at the ACPM Annual General Meeting
- » Discounts for:
  - ACPM National Conference – the premier event for the retirement income industry
  - Regional Council events featuring timely and relevant speakers and topics
  - “CareerPost” listings for employers and career seekers
  - Special Programs – eBlasts, Webinars, Retirement Literacy, The Observer



## MEMBERSHIP TYPES

	TYPE	DESCRIPTION
General Individual Membership	<b>INDIVIDUAL</b>	Currently engaged in the retirement income industry
	<b>RETIRED</b>	Individual no longer in the retirement income industry in any capacity
	<b>STUDENT</b>	Full-time student wishing to be affiliated with ACPM
Plan Sponsor Membership	<b>PLAN SPONSOR INDIVIDUAL</b>	4 members or less
	<b>PLAN SPONSOR GROUP MEMBERSHIP</b>	5 to 9 members
	<b>PLAN SPONSOR GROUP MEMBERSHIP</b>	10 or more members
Executive Membership	<b>LEADERSHIP LEVEL</b>	Contact National Office for more details
	<b>SUPPORTING LEVEL</b>	

Please visit [www.acpm.com](http://www.acpm.com) for membership details and rates.

# Volunteer Recognition Awards

## ACPM DON IRELAND AWARD FOR EXCEPTIONAL VOLUNTEERISM

2017

CHRIS BROWN



2016



Susan Nickerson

2015



Scott Perkin

2014



Étienne Brodeur *(tie)*

2014



Bill Turnbull *(tie)*

2013



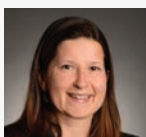
Paul Litner

2012



Claude Reny

2011



Rosalind Gilbert

2010



Becky J. West

2009



Andrew Harrison

ACPM is the leading advocacy organization for the retirement income industry in Canada due to the dedication and commitment of our volunteers who have been essential to the success of ACPM.

Starting in 2009, individual volunteers have been honoured for their outstanding contributions and are acknowledged with the Don Ireland Award for Exceptional Volunteerism, the ACPM Industry Award or the ACPM Regional Award. All award winners have been significant and consistent contributors to ACPM.

We would also like to acknowledge the dozens of volunteers who may not have been award winners but have provided their time and expertise in support of the ACPM Mission.

## ACPM INDUSTRY AWARD

2017

MICHEL ST. GERMAIN



2014

EMILIAN GROCH



## ACPM REGIONAL COUNCIL AWARD

2017

SERGE CHARBONNEAU



2015

ROSS DUNLOP





ACPM would like to extend our gratitude to Executive Member organizations for their generous support in the **2017–18** fiscal year.

# Executive Members

## LEADERSHIP LEVEL



## SUPPORTING LEVEL



**NOTE:** We respect the privacy of Executive Members who have requested that their organizations remain anonymous.

# 2017 National Conference Sponsors

## DIAMOND



## RUBY



## Emerald



## Sapphire



## Jade



## Opal



## Topaz



# National Office

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*Contact information is not to be used for unsolicited  
commercial electronic messages.*



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The Association of Canadian Pension Management  
L'Association canadienne des administrateurs de régimes de retraite

[www.acpm.com](http://www.acpm.com)