



# ACPM ANNUAL REPORT 2018|19



**ACPM | ACARR**

*The Voice of the Retirement Income Industry.*



**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 millions of plan members.



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# 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

THE LEADING  
ADVOCATE FOR  
THE CANADIAN  
RETIREMENT INDUSTRY

**SUSAN NICKERSON**  
Chair, ACPM Board of Directors

It has been a privilege and an honour to assume the role of Chair of the ACPM Board of Directors as of September 2018. As the leading advocacy organization for the retirement income industry, ACPM has continued to demonstrate leadership in its commitment to improve the Canadian retirement income system and I look forward to actively ensuring that this vital and important work continues.



I would like to recognize the outstanding contributions of our former Board Chair, Michel Jalbert, and the support he has provided during the transition period. In the latter half of 2018, we also appointed a longstanding ACPM employee, Ric Marrero, to the position of Chief Executive Officer and we look forward to working with him in this important role as ACPM moves forward in fulfilling its mandate.

As a volunteer and member-driven organization, it is essential that the hard work and dedication of our many volunteer members be appreciated and recognized. I would like to acknowledge Pierre Lavigne, one of ACPM's longest serving volunteers, who recently retired from the Board of Directors and now leads the Quebec Regional Council.

I would also like to applaud all ACPM volunteers for their dedication to ensure the success of our advocacy efforts, our events, seminars and programs. This level of dedication was on full display at the 2018 ACPM

National Conference in Quebec City, a bilingual three-day event that featured an excellent mix of industry knowledge and networking in a fascinating and historic city. We look forward to seeing you all at the 2019 National Conference in Vancouver on September 10–12, 2019.

Over the past year, ACPM's advocacy activities and initiatives continued at a swift pace with nearly two dozen consultations and letters being provided to federal and provincial government officials, regulators and agencies. Here is a brief list of some key topics that were addressed during this period:

- › **Federal Retirement Security Consultation**
- › **Québec's Disparity in Treatment Clauses (based on the date of hire in pension plans; also known as "orphan clauses")**
- › **Solvency payment reductions for Crown corporations**

- › **Funding Framework for Target Benefit Plan MEPPs in Ontario**
- › **Modernization of the Unclaimed Balances Regime**
- › **Funding of Benefits for Defined Benefit Plans**
- › **Funding reviews in Saskatchewan, Manitoba, Nova Scotia and British Columbia**

In addition to our individual efforts, we participated in a coalition involving ACPM, CARP, CIA, CLHIA, Common Wealth, the National Institute on Ageing and PIAC that promoted new retirement income options. These joint efforts complimented and followed ACPM's ongoing advocacy initiatives relating to the need for new decumulation measures and products, as outlined in ACPM's 2017 paper entitled ***Decumulation, the Next Critical Frontier: Improvements for Defined Contribution and Capital Accumulation Plans***. We were very pleased to see our recommendations reflected in the 2019 Budget with the introduction of advanced life deferred annuities (ALDAs) and variable payment life annuities (VPLAs).

ACPM has also continued to strengthen its jurisdictional presence and advocacy through our six regional councils who conducted 19 events with 1,200 attendees in 2018. Their events were complemented by ACPM's advocacy and relationship building activities and meetings with CAPSA, various ministry of finance officials responsible for retirement income and the pension regulators across Canada.

As we look forward to the year ahead, I want to acknowledge our Executive Members who represent the highest level of ACPM membership and commitment. I am so pleased to welcome three new Executive Members of ACPM: OMERS Sponsor Corp., Alberta Investment Management Corporation (AIMCo) and Schroders.

It is the support of our Executive Members as well as our entire membership that enables us to continue our advocacy activities. Our members' input and expertise provides the valuable insights that assist in guiding government officials as they strive to balance various stakeholder interests in retirement policy and legislation.

*Moving into the future, Canada is facing the significant challenge of addressing the needs of an increasing number of retirees and the erosion of workplace pension plan coverage. During these changing times, it is more important than ever that ACPM continues to be a leader in promoting the expansion of workplace retirement plan coverage and improving retirement outcomes for Canadians.*

Sincerely,



**Susan Nickerson**  
Chair, Board of Directors  
ACPM

# National Board of Directors 2018|19

## BOARD OFFICERS

### **SUSAN NICKERSON**

Chair of the Board  
Toronto, ON

Partner  
*Torys LLP*



### **ROSS DUNLOP**

Vice-Chair of the Board  
Winnipeg, MB

Partner  
*Ellement Consulting*



### **ANDREA PERRY**

Secretary  
Halifax, NS

Senior Client Relationship Manager  
*Northern Trust*







**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  
Office Business Leader, Wealth  
*Mercer*



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



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



**MICHEL JALBERT**, Director  
Montréal, QC  
Senior Vice-President, Business  
Development & Client Partnerships  
*Addenda Capital*



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



**JULIEN RANGER**, Director  
Montréal, QC  
Partner, Pensions & Benefits  
*Osler, Hoskin & Harcourt LLP*



**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

#### SUSAN NICKERSON

Torys LLP

### MEMBERS

#### CHRIS BROWN

Alberta Local Authorities Pension Plan Corp.

#### KATHRYN BUSH

Blake, Cassel & Graydon LLP

#### ROSS DUNLOP

Ellement Consulting

#### JEFF NORTON

TRAF

#### TODD SAULNIER

Mercer

#### RIC MARRERO, CEO

ACPM

## 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

#### ELEANOR MARSHALL

Bell Canada

### MEMBERS

#### KENNETH BURNS

Lawson Lundell LLP

#### ANDREA PERRY

Northern Trust

#### MICHEL JALBERT

Addenda Capital

#### SUSAN NICKERSON, Chair of the Board (ex officio)

Torys LLP



## 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

#### SUSAN NICKERSON, Chair of the Board (ex officio)

Torys LLP

## 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

Mercer

### MEMBERS

#### DEREK DOBSON

CAAT Pension Plan

#### JOHN HALLETT

Sun Life Financial

#### JULIEN RANGER

Osler, Hoskin & Harcourt LLP

#### SUSAN NICKERSON, Chair of the Board (ex officio)

Torys LLP

# Advocacy

Since its inception in 1976, ACPM has become Canada's leading voice for the retirement income industry. With the help of committed volunteers with a range of expertise, 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 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.

## SUBMISSIONS

### JANUARY

- » Reform of Ontario's Funding Rules for Defined Benefit Pension Plans

### FEBRUARY

- » *Letter re:* Québec's disparity Clause
- » Response to Manitoba PBA Review
- » Response to Ontario Funding Rules
- » Response to Ontario PBGF Consultation
- » *Letter re:* FSCO Superintendent Exercise of powers under the Pension Benefits Act

### MARCH

- » Solvency payment reductions for agent Crown corporations

### APRIL

- » *Letter re:* Bond Issuance for federally regulated plans

### MAY

- » *Letter re:* FSCO Policy for Administrative Penalties under the Pension Benefits Act
- » Submission to the public consultation on Québec Bill 176
- » *Letter re:* Proposed Regulations to implement Variable Benefits in Ontario
- » *Letter re:* Proposed Regulations Relating to the Funding Framework for Target Benefit Plan MEPPs in Ontario

### AUGUST

- » *Federal* — Modernization of the Unclaimed Balances Regime and Proposals for an Unclaimed Pension Balances Framework
- » CAPSA — Funding of Benefits for Defined Benefit Plans

### SEPTEMBER

- » *Consultation on CAPSA Guideline N° 8* — Defined Contribution Pension Plan Guideline
- » *Coalition Letter* — Enhancing the efficiency of retirement income options for older Canadians

### OCTOBER

- » Solvency Funding in Saskatchewan

### DECEMBER

- » CAPSA *Consultation* — Electronic Communication
- » CAPSA *Consultation* — Annuity quotations for solvency valuations
- » Federal Retirement Security Consultation
- » British Columbia Solvency Funding Consultation
- » FSRA Fees



# Report of the Audit and Finance Committee

## FOR THE YEAR ENDING JANUARY 31, 2019

Financial highlights include the following:

1. Net Assets at January 31, 2019, were \$880,993 compared to \$607,148 at the same time the previous year.
2. The Association recorded an operating surplus of \$272,708.
3. Revenues came in at \$1,396,846 compared to \$1,475,893 the previous year. This decrease was due to memberships and the National Conference.
4. Expenses totalled \$1,124,138 as compared to \$1,410,877 the previous year.
5. At year-end, ACPM had \$723,523 (including interest) in investments. This meets with ACPM Reserve policy, which ensures that sufficient funds are set aside to allow for fluctuations in revenues, 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:** After April 8, 2019, ACPM's audited 2018–19 financial statements will be available in the "Members Only" section of the ACPM website ([www.acpm.com](http://www.acpm.com)).

## COMMITTEE MEMBERS

**ELEANOR MARSHALL**, Chair  
Bell Canada

**KENNETH BURNS**  
Lawson Lundell LLP

**ANDREA PERRY**  
Northern Trust

**MICHEL JALBERT**  
Addenda Capital

**SUSAN NICKERSON**, Chair of the Board  
(ex officio)  
Torys LLP



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

## NATIONAL CONFERENCE PLANNING COMMITTEE (NCPC) — Québec City, QC

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 F. HUBERT TREMBLAY** — Mercer  
**VICE- CHAIR KENNETH BURNS** — Lawson Lundell LLP

## 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 JOE CONNOLLY** — Morneau Shepell  
**VICE- CHAIR AL KIEL** — 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 PIERRE LAVIGNE**  
**VICE- CHAIR ALYSSA HODDER** — Eckler Ltd.

### 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 (FC)** 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**

**ANDREA BOCTOR**  
Stikeman Elliott LLP

## **PARTICIPATING ORGANIZATIONS**

**AIR CANADA**

**BANK OF CANADA**

**BELL CANADA**

**CANADA POST**

**CANADIAN PACIFIC**

**CN**

**ENBRIDGE**

**FARM CREDIT CANADA**

**HALIFAX PORT ILA/HEA**

**PENSION PLAN**

**MERCER**

**NATIONAL BANK OF CANADA**

**NAV 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

**SUSAN NICKERSON**, Chair of the Board  
Torys LLP

**TODD SAULNIER**, Chair, National Policy Committee  
Mercer





## REGIONAL COUNCIL MEMBERS

### British Columbia Regional Council (BCRC)

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

**BARB BILSLAND**, Vice-Chair  
Bisland Griffith Benefit Administrators

### Alberta Regional Council (ABRC)

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

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

### Prairie Regional Council (PRC)

**DALE MARKEWICH**, Chair  
SHEPP

**BRAD PROKOP**, Vice-Chair  
Teachers' Retirement Allowances Fund

### 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)*

**PIERRE LAVIGNE**, Chair

**TINA HOBDAY**, Vice-Chair  
Langlois Lawyers LLP

### Atlantic Regional Council (ARC)

**SARAH SISSONS**, Chair  
Morneau Shepell

**JIM POWER**, Vice-Chair  
Sun Life Financial

### Federal Council (FC)

**DUNCAN BURRILL**, Chair  
CBC Pension Fund

**ANDREA BOCTOR**, Vice-Chair  
Stikeman Elliott LLP

# Regional Councils

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 is produced in conjunction with the Regional Councils.

The 2018 National Session entitled **“The Future Isn’t What It Used to Be: Plan Design and Longevity Risk”** examined two challenging issues facing plan sponsors, administrators, trustees and service providers:

- » *Planning for the Next Decade: Is Your Plan Ready?*
- » *Longevity Risk: How to Ensure You Don’t Run Out of Money (and still enjoy retirement)*

## 2018–19 REGIONAL COUNCIL ACTIVITIES

### British Columbia Regional Council

**Target Practice: Lessons from the First Two Years of Target Benefit Plans in British Columbia**

*Featured:*

**Laura O’Neill** – Trustee, *BC Target Benefit Pension Plan*

**Andrea Knoll** – Principal, *Morneau Shepell*

**Transforming Risk: What You Need to Know!**

*Featured:*

**Peter Muldowney** – Senior Vice President, *Connor, Clark & Lunn Financial Group*

**Mazen Shakeel** – Vice President, Market Development, Group Retirement Services, *Sun Life Financial*

### Alberta Regional Council

**Blockchain – not just Cryptocurrencies: What Pension Professionals Need to Know**

*Featured:*

**Ryan Kothari** – Vice President, Senior Relationship Manager, *Northern Trust*

**Arijit Das** – Senior Vice President, FinTech Solutions and Enterprise Messaging, *Northern Trust*

### Prairie Regional Council

**Retirement Outcomes: What do your employees need to know to prepare themselves for retirement?**

*Featured:*

**Louis Martel** – Managing Director & Chief Strategist, *Greystone Managed Investments*

**John Hallett** – Retirement Strategist, Group Retirement Services, *Sun Life Financial*



## Ontario Regional Council

### **Ontario Funding Reforms: Actuarial and Investment Implications for Pension Plans**

**Featured:**

**Dave Makarchuk** – Partner, Wealth Business  
*Mercer Canada*

**Linda Byron, FCIA, FSA** – Senior Partner, *Aon*

**Lindy Charles** – Director, Actuarial Services & Tax,  
*Ontario Teachers' Pension Plan*

### **What is Your Privacy and Cybersecurity Electronic Quotient (EQ)? Pension Law Considerations**

**Featured:**

**Dan Michaluk** – Partner,  
*Hicks Morley Hamilton Stewart Storie LLP*

**Adam Ngan** – Associate, *Blake, Cassels & Graydon LLP*

**Steve Hurley** – *Manulife*

### **Annual Golf Tournament**

The 2018 annual professional networking event occurred at the Angus Glen Golf Club.

## Le Conseil du Québec

### **Régimes de retraite : les chefs du CPQ et de la CSN partagent leurs visions respectives**

**Featured:**

**Yves-Thomas Dorval** – Président-directeur général du  
*Conseil du patronat du Québec (CPQ)*

**Jacques Létourneau** – Président de la *Confédération des syndicats nationaux (CSN)*

### **L'évolution des fonds cycle de vie**

**Featured:**

**Gilles Lavoie** – *Mercer*

**Marie-Chantal Cloutier** – *La Great-West*

**Anne Meloche** – *Placements mondiaux Financière Sun Life*

**Serge Lapierre** – *Manuvie*

**Julie Ducharme** – *Blackrock*

**Hélène Beaulieu** – *SNC Lavalin*

**Daniel Simard** – *Bâtirente*

## Atlantic Regional Council

### **Improving your Plan Member's Financial Literacy**

**Featured:**

**Derek Dobson** – CEO and Plan Manager, *CAAT Pension Plan*

**Laurie Paterson** – Director, Education Consulting Services,  
*Sun Life Financial*

**Colette Komst** – Total Rewards Specialist, *Atlantic Lotto Corp.*

**Marilyn Quinn** – Trustee for both the *New Brunswick Public Service Pension* and *Shared Risk Plan for Certain Bargaining Employees of New Brunswick Hospitals*

**Todd Saulnier** – Senior Principal, *Mercer*

# Additional Activities

## WEBINAR PROGRAM

In 2018, the ACPM webinar program expanded thanks to its popularity among presenters and participants alike. Here is the list of presentations that were available this past year:

### ***Pensions Canadians Want***

*Presented by:*

**Derek W. Dobson** – CEO, CAAT Pension Plan

**Judy Payne** – Executive Director,  
*British Columbia Municipal Pension Plan*

### ***Longevity Risk Transfers for Pension Plans***

*Presented by:*

**Amy Kessler** – SVP & Head of Longevity Risk Transfer,  
*Prudential Retirement*

**Arnaud Bensoussan** – VP, Longevity Risk Transfer,  
*Prudential Retirement*

**Ian Edelist** – CEO, *Club Vita Canada*

### ***The Changing Pension Funding Landscape in Canada: Provincial, National and Global Perspectives***

*Presented by:*

**Linda Byron, FSA, FCIA** – Senior Partner, *Aon*

**Jason Malone, FSA, FCIA** – Partner, *Aon*

**Nathan LaPierre, FCIA, FSA** – Associate Partner, *Aon*

### ***Rethinking Investment Fees and the “Value for Money” Equation***

*Presented by:*

**Daniel Brocklebank** – Director and Head of  
United Kingdom (UK), *Orbis Investments*

### ***Quantifying the Effects of ESG Factors: Challenges and Opportunities***

*Presented by:*

**Andrew Sweeney** – Vice-President and Portfolio Manager,  
*Phillips, Hager & North Investment Management*

### ***Breaking Up - It's You, Not Me!***

### ***When to Fire Your Investment Manager***

*Presented by:*

**Marc Williams, CFA, FCIA** – Vice President, Portfolio Manager,  
*Leith Wheeler Investment Counsel Ltd.*

**Jacky Shen** – Director of Treasury, *Simon Fraser University*

### ***An Uberized Economy: This is revolutionary!***

*Presented by:*

**Benoît Durocher** – Executive Vice-President and  
Chief Economic Strategist, *Addenda Capital*

## RETIREMENT LITERACY WEBSITE

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

Now entering its fourth year, the Retirement Literacy website aims to provide Canadians with important information to help them plan their retirement. Inspired by the federal government's financial literacy initiative, the website hopes to address issues that are particularly challenging for people of all ages. Content includes educational quizzes about government programs, workplace retirement savings plans, individual savings plans, the Canada Pension Plan Investment Board and CPP Benefits. Visitors can also access links to additional information about saving for retirement. The ACPM Retirement Literacy Initiative was made possible through the generosity of these project sponsors:





## THE OBSERVER

(<http://www.acpm.com/ACPM/The-Observer/2019-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 have supported “*The Observer*” in 2018–19:



## 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 associated service providers.

# Membership

## 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

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.

## 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
<b>General Individual Membership</b>	<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
<b>Plan Sponsor Membership</b>	<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
<b>Executive Membership</b>	<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

Without the dedication and commitment of our volunteers, ACPM would not have become the leading advocacy organization for the retirement income industry in Canada. **They are essential to our success.**

Since 2009, these outstanding individual volunteers, who have contributed significantly and consistently to ACPM, have been acknowledged by way of one of these three awards:

- » **THE DON IRELAND AWARD FOR EXCEPTIONAL VOLUNTEERISM** — Recognizes the exceptional effort and achievements of an individual over a significant period of time on behalf of ACPM.
- » **THE ACPM INDUSTRY AWARD** — Recognizes the efforts and achievements of an individual who has proven to be an inspiration for fundamental change in the Canadian retirement income industry.
- » **THE ACPM REGIONAL AWARD** — Recognizes the efforts an individual who has significantly contributed to the work, growth and development of their Council.

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 DON IRELAND AWARD FOR EXCEPTIONAL VOLUNTEERISM WINNERS

<b>2018</b>		<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
KATHRYN BUSH					
					
		Chris Brown	Susan Nickerson	Scott Perkin	Étienne Brodeur <i>(tie)</i>
<b>2014</b>	<b>2013</b>	<b>2012</b>	<b>2011</b>	<b>2010</b>	<b>2009</b>
					
Bill Turnbull <i>(tie)</i>	Paul Litner	Claude Reny	Rosalind Gilbert	Becky J. West	Andrew Harrison

## ACPM INDUSTRY AWARD WINNERS

		
<b>2018</b>	<b>2017</b>	<b>2014</b>
ELEANOR MARSHALL	MICHEL ST-GERMAIN	EMILIAN GROCH

## ACPM COUNCIL AWARD WINNERS

		
<b>2018</b>	<b>2017</b>	<b>2015</b>
DUNCAN BURRILL	SERGE CHARBONNEAU	ROSS DUNLOP



# Executive Members

ACPM would like to extend its gratitude to Executive Member organizations for their generous support in the **2018–19** fiscal year.

## LEADERSHIP LEVEL



## SUPPORTING LEVEL



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

# 2018 National Conference Sponsors

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