



ACPM | ACARR

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

ACPM ROUNDTABLE BROADCAST

Guidance and Information You Can Use Today



November 29, 2023

INVESTMENT OUTLOOK 2024

AND BEYOND

This year was anticipated to be the year of the “return to normalcy” but, as the distortions from the pandemic were waning, investors had to deal with increases in inflation, the resulting shift in monetary policy, rising longer term interest rates and the fear of an economic recession. The challenges for today’s investors are significant and the possibility of a new and much changed investment landscape is on the horizon.

Our expert speakers will cover numerous topics that will provide you with a sense of the state of capital markets today and what’s coming up in 2024. From inflation and interest rates to liquidity and currency hedging, the speakers will offer their comments on economic and market factors and strategies that will drive investment results for years to come. This session will touch on trends, opportunities and challenges awaiting institutional investors in both the public and private markets.

Whether you represent a retirement plan with assets of a few million dollars or hundreds of billions of dollars, this webinar is for you.

DATE: Wednesday, Nov 29, 2023

TIME: 12:00-1:00pm ET

SPEAKERS

Benoît Durocher, Executive Vice-President and Chief Economic Strategist, [Addenda Capital](#)

Rajiv Nambiar, Managing Director, Head - Global Market Services, [RBC Investor Services](#)

James Robertson, Head of Canadian and Global Asset Allocation, [Manulife Investment Management](#)

MODERATOR

Gosia Talanczuk, Vice President, Investment Policy and Oversight, [Local Authorities Pension Plan \(LAPP\)](#)

BIOGRAPHIES

SPEAKERS



Benoît Durocher, Executive Vice-President and Chief Economic Strategist,
[Addenda Capital](#)

Benoît is responsible for Addenda's overall economic outlook. He also leads the Active Duration team in fixed income and actively contributes to client relations. Benoît joined Addenda in 1997 and is part of the Firm's Executive Committee. His experience spans over 35 years during which he held various roles at Royal Bank of Canada and at the Ministère du Revenu and the Ministère des Finances du Québec.

Benoît holds a Bachelor's degree in Economics from McGill University and a Master's degree in Economics from Université Laval. He is also a board member of the Cancer Research Society and of the Compagnie Jean Duceppe.



Rajiv Nambiar, Managing Director, Head - Global Market Services,
[RBC Investor Services](#)

Rajiv Nambiar is Managing Director & Head of Global Market Services and Business Development at RBC Investor Services.

Rajiv manages teams in North America, UK, Europe, and Asia. He oversees sales & trading, execution, and product strategy for the markets business, which includes foreign exchange, securities finance, and cash management, including liquidity and interest risk for the subsidiary. He also oversees custody and fund services sales for the organization. He is a member of the Investor Services Senior Management Leadership. Rajiv's previous experience involved advising, structuring, and implementing strategic financing solutions for corporations and financial institutions.

Prior to joining RBC in 2010, he worked at a US bulge-bracket investment bank, engineering and executing multi-asset derivatives strategy to support alternative finance, cross-border investments, and risk management. Rajiv holds an MBA (Dean's Honour List) from Western University.

SPEAKERS



James (Jamie) Robertson, CIM Head of Asset Allocation–Canada, and Global Head of Tactical Asset Allocation, Multi-Asset Solutions Team

[Manulife Investment Management](#)

Jamie is responsible for overseeing all aspects of the firm's Canadian asset allocation franchise, including portfolio management, research and development, product development, business development, and trading. He leads Canadian portfolio management efforts across a wide range of multi-asset and multimanager solutions. In addition, as global head of tactical asset allocation, Jamie takes a leading role in driving the tactical positioning and the portfolio construction process of tactically oriented solutions globally. Previously,

Jamie was the chief investment officer for McLean and Partners in Calgary. Prior to that, he was vice president, proprietary investments (equities), at Manulife Financial, following four years as an internal hedge fund manager there. Earlier in his career, he held executive positions at CT Securities, JP Morgan Canada, and BLC Securities. Jamie holds the Canadian Investment Manager designation.

MODERATOR



Gosia Talanczuk, Vice President, Investment Policy and Oversight, [Local Authorities Pension Plan \(LAPP\)](#)

Gosia is the Vice President, Investment Policy and Oversight at Local Authorities Pension Plan (LAPP), the largest defined benefit pension plan in Alberta, serving over 291,000 members and 437 employers from the healthcare, municipal and education sectors. In 2023, the size of the LAPP fund has exceeded C\$61 billion.

Gosia is responsible for developing the Plan's investment policy and asset mix, and for advising the CEO and the Corporate and Sponsor Boards on the strategic direction of the Plan, risk management, and the implementation of the policy by the Plan's investment management organization, Alberta Investment Management Corporation (**AIMCo**).

Prior to joining LAPP, seven years ago, she spent 17 years at AIMCo and AIMCo client organizations managing traditional and alternative investment pools and strategies on behalf of Alberta pension, endowment, and other institutional funds.

Gosia has earned a Master of Law degree from the University of Wroclaw (Poland), a Bachelor of Commerce degree with Distinction, majoring in finance, from the University of Alberta, and holds a Chartered Alternative Investment Analyst designation. She completed the Canadian Securities Course as well as additional courses in negotiations, management, and communications.

ADVOCACY



ACPM is the leading advocacy organization for the retirement income industry in Canada. To see a complete list of ACPM papers, submissions and comment letters, please see "Advocacy" www.acpm.com

FEBRUARY 2023

- » [Finance Canada's Decision to Cease the Issuance of Real Return Bonds \(RRBs\) – Impact on Pension Benefit Security](#)
- » [ACPM submission to the Senate review of Bill C-228](#)



MARCH 2023

- » [Response to CAPSA Strategic Plan 2023-2026](#)
- » [Évaluations actuarielles de solvabilité pour des régimes de retraite avec participants hors Québec \(French only\)](#)



MAI 2023

- » [Budget Implementation Act, 2023 No. 1 – Division 2 Private Pension Plans](#)
- » [Projet de règlement concernant le financement des régimes de retraite à prestations déterminées des secteurs municipal et universitaire \(French only\)](#)



JUNE 2023

- » [ACPM Response to Ontario's Target Benefits Consultation](#)

JULY 2023

- » [ACPM response to Canada Gazette, Part I, Volume 157, Number 25: Regulations Amending the Pension Benefits Standards Regulations, 1985 \(Persons who Cannot be Located\)](#)



AUGUST 2023

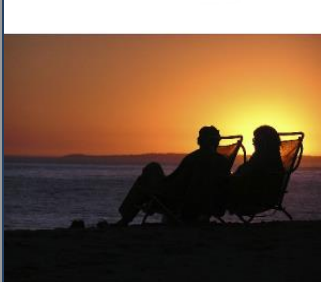
- » [Coalition Letter - Response to Draft CAP Guideline No 3](#)

SEPTEMBER 2023

- » [CAPSA Pension Plan Risk Management Consultation](#)

OCTOBER 2023

- » [ACPM response to OSFI Data Collection Modernization Initiative](#)
- » [ACPM response to Ontario's Follow-Up Consultation Document - A Permanent Framework for Target Benefits: Revised Proposals](#)



NOVEMBER 2023

- » [ACPM submission - Auto-features in pension and workplace plans](#)
- » [ACPM submission on Real Return Bonds](#)
- » [ACPM response to OSFI Cyber Incident Reporting](#)

ACPM MEMBERSHIP

ACPM Membership Represents:

Plan Sponsors, Administrators and Trustees ♦ Actuarial, Consulting and Accounting Firms
Investment and Legal Firms ♦ Custodians and Record Keepers ♦ Organized Labour
HR Professionals ♦ Government/Agency Employees
Professional and Industry Associations

- Canada's leading advocacy body representing the retirement income industry
- 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, Defined Contribution and Target Benefit Plans
 - Federally and Provincially Regulated Pension Plans
 - Decumulation
 - Financial Literacy
 - Many other important federal and provincial issues

INDIVIDUAL MEMBERSHIP BENEFITS

- ACPM programs and events:
 - **Free registration** for webinars and broadcast roundtables
 - Discounts for the 2024 ACPM National Conference, September 24th -26th, Kelowna, B.C.
 - Share your message with industry professionals through our [Webinar and eBlast](#) Programs
- Timely communications:
 - "CONTACT" eNewsletter to keep you informed on the latest developments
 - "[The Observer](#)" — a popular "go to" industry "news and views" online publication
 - "[CareerPost](#)" — online career opportunities for employers and career seekers
 - Special access to member lists, information archives, and special event presentations
 - [Retirement Literacy Hub](#) - where ACPM offers a free, online Retirement Savings Course open to anyone who wants to learn more about retirement income
- Professional development and volunteer opportunities:
 - Eligibility to join Regional Councils, and National Committees
 - Voting and nomination rights at the Annual General Meeting
 - Attending ACPM conferences, seminars and webinars can be counted towards **Continuing Professional Development** hours!

INDIVIDUAL MEMBERS	PLAN SPONSOR MEMBERS*
<ul style="list-style-type: none">- General Individual Membership Program- Individual Membership Brochure- Welcome Brochure- Individual Membership Benefits- Individual Membership Form - Online- Individual Membership Form - PDF	<ul style="list-style-type: none">- FAQs on the Plan Sponsor Membership- Individual Membership Brochure- Plan Sponsor Membership benefits- Plan Sponsor Individual Membership Form - Online- Plan Sponsor Individual Membership Form - PDF- Plan Sponsor Group Membership Form

(* - Includes Plan Sponsors, Administrators, Trustees and Government Employees. Does not include service provider administrators who can apply under the General Individual Membership category.)

LEADERSHIP PROGRAM BENEFITS

- COMPLIMENTARY Individual Memberships (4 for Platinum Level; 2 for Gold Level);
- Membership is TRANSFERABLE to a company colleague;
- FREE member and employee registration for ACPM Roundtable Broadcasts and Webinars (excludes ACPM National Conference and Regional Conferences);
- CORPORATE PROFILE in “CONTACT”, the monthly member eNewsletter;
- 15% (Platinum) or 10% (Gold) registration DISCOUNTS for all company employees for the
 - 2024 ACPM National Conference, Kelowna, B.C., September 24 to 26 (in-person),
 - 2024 Regional Conferences and in-person events
- FREE Webinar hosting for your Presentation and Speakers;
- EXCLUSIVE 2024 President’s Invitational Dinner and Leadership Roundtable (Toronto and Montreal);
- ARTICLE in “The Observer” industry eNewsletter and preferred ad rates;
- UNLIMITED AND COMPLIMENTARY postings for “CareerPost” on the ACPM website;
- TWO COMPLIMENTARY eBlast program emails on an annual basis.
- CORPORATE LOGO on the ACPM website and in the ACPM Annual Report.

There are two types of Leadership Program levels: Platinum and Gold.

[Current Leadership Supporters](#)

[Leadership Program Brochure](#)

[Leadership Program Form - Online](#)

[Leadership Program Form - PDF](#)

For any other questions, please contact: membership@acpm.com

ACPM LEADERSHIP ORGANIZATIONS

Platinum Level

Alberta Investment Management Corp. ♦ Aon ♦ CIBC Mellon
CPP Investments ♦ Canada Life ♦ Desjardins
Healthcare of Ontario Pension Plan ♦ Mercer ♦ Northern Trust
Ontario Teachers' Pension Plan ♦ RBC Investor Services
Sun Life ♦ TELUS Health ♦ WTW

Gold Level

Addenda Capital ♦ AGF ♦ Blakes ♦ BMO Global Asset Mgmt.
Brookfield Annuity ♦ CIBC ♦ CWB Trust Services ♦ Eckler ♦ Fasken
Fiera Capital ♦ Franklin Templeton ♦ Lawson Lundell
Leith Wheeler Investment Counsel ♦ Leslie Consulting Group
Linea Solutions ♦ Manulife Investment Mgmt.
McCarthy Tétrault ♦ Miller Thomson ♦ Normandin Beaudry
OPTrust ♦ Osler ♦ PH&N Institutional ♦ S&P Dow Jones Indices ♦ Torys
Teachers' Retirement Allowances Fund ♦ Van Berkomp Global Asset Mgmt.

ACPM EVENTS

Creating a Culture of AI for Canadian Pension Funds

Hosted by Linea Solutions

December 13, 2023, 12:00-1:00pm ET

Save the Date!

2024 ACPM National Conference

Delta Grand Okanagan

Kelowna, B.C.

September 24 – 26, 2024



2024 ACPM
**NATIONAL
CONFERENCE**

CONGRÈS
NATIONAL 2024
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