



2025 ACPM  
**NATIONAL  
CONFERENCE**



HARBOURING  
STRENGTH

**Navigating the Future of  
Retirement Strategy**

Halifax, NS

HALIFAX CONVENTION CENTRE

SEPTEMBER 9-11



**:: CONFERENCE AGENDA ::**

DIAMOND SPONSOR



Investor  
Services

# WELCOME TO THE 2025 ACPM NATIONAL CONFERENCE

Join us as we delve into the world of retirement income management at this year's ACPM National Conference "Harbouring Strength: Navigating the Future of Retirement Strategy". Drawing upon the deep experience and insights of our speakers, we'll navigate through the triumphs and challenges that define Canada's pension landscape.

Together, let's ignite a dialogue on increasing workplace pension coverage and improving outcomes to create a brighter retirement for more Canadians.



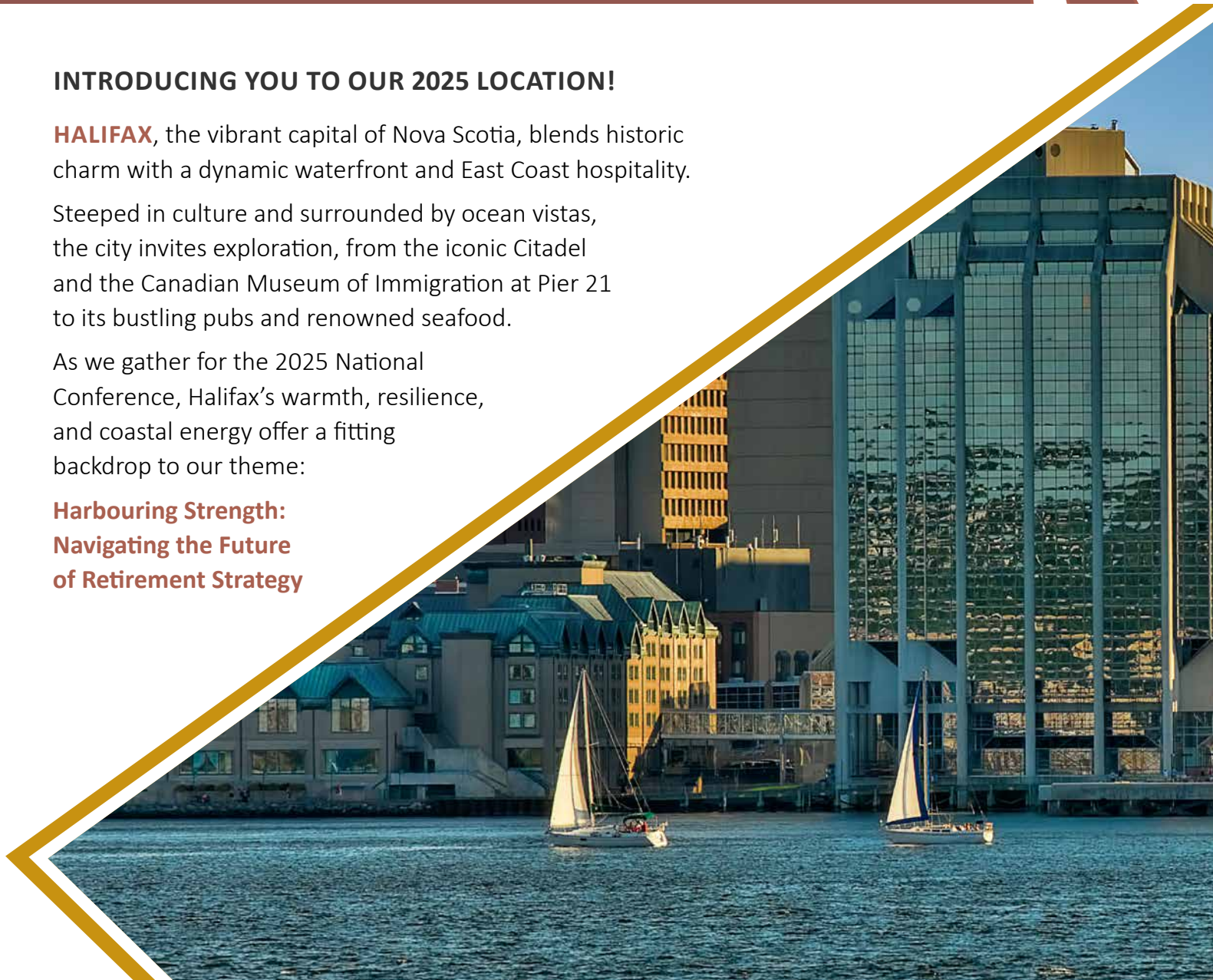
## INTRODUCING YOU TO OUR 2025 LOCATION!

**HALIFAX**, the vibrant capital of Nova Scotia, blends historic charm with a dynamic waterfront and East Coast hospitality.

Steeped in culture and surrounded by ocean vistas, the city invites exploration, from the iconic Citadel and the Canadian Museum of Immigration at Pier 21 to its bustling pubs and renowned seafood.

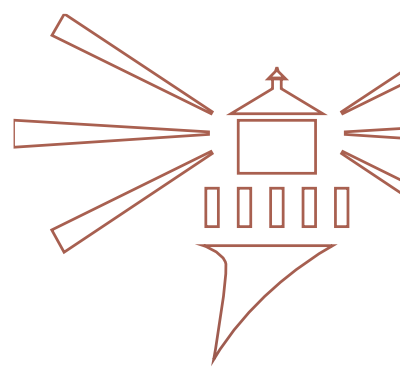
As we gather for the 2025 National Conference, Halifax's warmth, resilience, and coastal energy offer a fitting backdrop to our theme:

**Harbouring Strength:  
Navigating the Future  
of Retirement Strategy**





# TUESDAY SEPTEMBER 9 CONFERENCE DAY 1



**7:30 AM – 3:30 PM**

## **GOLF AT THE GLEN ARBOUR GOLF COURSE**

### **GOLF AT THE GLEN ARBOUR GOLF COURSE**

Kick off your conference experience with a round at Glen Arbour, one of Atlantic Canada’s premier golf destinations. Known for its pristine fairways and scenic lakeside holes, this championship course offers a unique blend of natural beauty and challenge.

Whether you’re networking or simply enjoying the game, Glen Arbour provides the perfect setting for meaningful connections before the sessions begin.

*Registration includes transportation, breakfast, lunch, and green fees.*



**12:00 PM – 8:00 PM**

### **REGISTRATION / INFORMATION DESK — HALIFAX CONVENTION CENTRE**

**NEW!**

**5:00 PM – 6:00 PM**

### **CONNECT WITH ATLANTIC REGULATORS**

**New this year!** Join us for a candid conversation with the Atlantic region’s top pension regulators as they share what’s on their radar, from current priorities to emerging issues and the evolving landscape of pension oversight. This is your chance to hear directly from the people shaping policy in Atlantic Canada.

*Bring your questions and your curiosity.  
Everyone is welcome!*

## **REGULATORS SESSION**

**6:30 PM – 8:00 PM**

## **WELCOME RECEPTION**

### **WELCOME RECEPTION — HALIFAX CONVENTION CENTRE**

Begin your conference experience with a warm East Coast welcome!

The Welcome Reception brings together delegates, speakers, and sponsors for an evening of conversation, connection, and regional flavour.

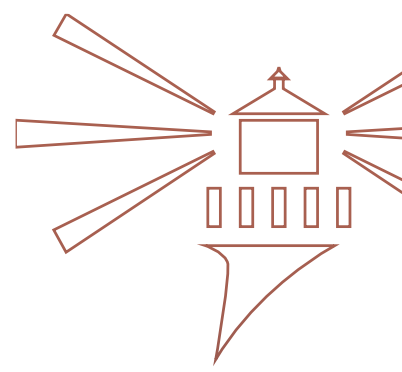
Enjoy casual networking, local hospitality, and the unmistakable spirit of Atlantic Canada as we celebrate the start of the 2025 National Conference.

*Let the conversations begin!*

*\* All time noted is in Atlantic Time.*



# WEDNESDAY SEPTEMBER 10 CONFERENCE DAY 2



7:00 AM – 5:00 PM

7:30 AM – 8:30 AM

**NEW!** 7:30 AM – 8:30 AM

## WOMEN'S NETWORKING BREAKFAST

8:35 AM – 8:45 AM

8:45 AM – 10:00 AM  
PLENARY I

10:00 AM – 10:30 AM



**REGISTRATION / INFORMATION DESK — HALIFAX CONVENTION CENTRE  
BREAKFAST**

### WOMEN'S NETWORKING BREAKFAST

A new exciting session, the **Women's Networking Breakfast** brings together industry professionals to exchange ideas, experiences, and inspiration.

With a focus on connection and community, this session aims to engage women in the retirement income industry by exploring the unique challenges and opportunities shaping their leadership journeys.

### WELCOME AND OPENING REMARKS

#### PENSIONS STAND ON GUARD FOR THEE: THE ROLE OF PENSIONS IN DOMESTIC ECONOMIC GROWTH

Delve into the complex interplay between pension plans' fiduciary responsibilities and their potential role in fostering domestic economic growth. This session will emphasize the critical balance between diversification and domestic investment, ensuring that fiduciary obligations to members are met without sacrificing returns.

Explore the strategic decisions behind pension fund investments and their broader economic implications. Attendees will gain valuable insights that enhance their understanding of the role pensions play in shaping the future of domestic economic development.

#### SPEAKERS

**SEBASTIEN BETERMIER**

Executive Director  
*International Centre for Pension Management*

**MARK WISEMAN**

Senior Advisor and Chairman of Canada  
*Lazard*

#### MODERATOR

**STEPHANIE KALINOWSKI**

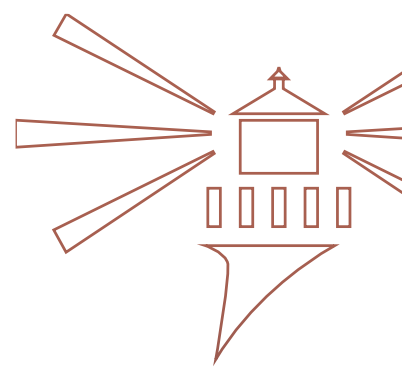
Partner  
*Torys LLP*

**REFRESHMENT BREAK / SPONSOR SHOWCASE**





# WEDNESDAY SEPTEMBER 10 CONFERENCE DAY 2



**10:30 AM – 11:30 AM**  
**CONCURRENT**  
**WORKSHOPS**

## WORKSHOP 1

### **Managing Investment Risk in the Face of Volatility – Where do Pension Plans Turn to Create Value?**

This panel is tailored for Pension Plan Promoters looking to navigate today's high-volatility environment. Join us as we explore investment strategies for uncovering opportunities in traditional and niche asset classes to drive alpha generation. Through fireside chat-style dialogue, we will contrast two distinctive investment styles, one traditional and one more sophisticated, as two pension plan promoters share how they innovate to manage risk and find opportunities to generate alpha amidst uncertainty.

#### **SPEAKERS**

**MARC GAUTHIER**, University Treasurer and Chief Investment Officer, *Concordia University*

**MATT MERRIAM**, Senior Analyst, Pension Investments, *Emera Inc.*

#### **MODERATOR**

**KATHERINE TWEEDIE**, co-heads the North America Institutional Client Group, *Ninety-One*

## WORKSHOP 2

### **Segment to Succeed: Unlocking Member Insights for Targeted Communications**

This dynamic session will delve into strategies for effective plan member communication and engagement. Celine Chiovitti, Chief Pension Officer at OMERS, shares findings from their research on member segmentation, which provides valuable insights into various member demographics. Moderated by Darcy McNeill, Vice President of Marketing and Communications at HOOPP, the discussion will cover the evolving nature of retirement and aging, with a highlight on the pension gap faced by women. Join us to unlock the power of targeted messaging and learn how to navigate the changing face of today's workforce to enhance member engagement and education.

#### **SPEAKER**

**CELINE CHIOVITTI**, Chief Pension Officer, *OMERS*

#### **MODERATOR**

**DARCY McNEILL**, Vice President, Marketing & Communication, *HOOPP*

## WORKSHOP 3

### **Navigating VPLA: From Legislative Changes to Industry Developments**

Join us for an informative workshop on Variable Payment Life Annuities (VPLA). The session will begin with an introduction to VPLA, followed by a legislative update. We will also examine the latest VPLA Standards of Practice from the Canadian Institute of Actuaries and consider VPLAs from the member's perspective. Finally, we'll discuss recent industry developments, providing valuable insights into the evolving landscape of VPLA.

#### **SPEAKERS**

**MARIANNE ASSAF**, Partner and Head of the Savings Practice, *Normandin Beaudry*

**TRICIA BROWN**, Director of Governance and Corporate Secretary, *Plannera Pensions & Benefits*

#### **MODERATOR**

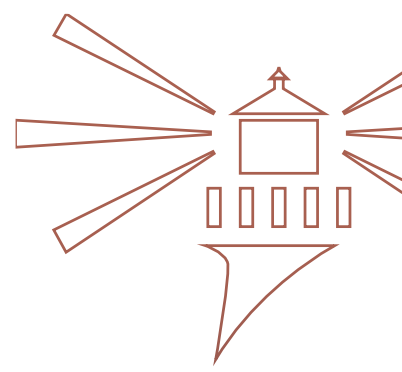
**SCOTT McMANUS**, AVP, Global Retirement & Savings, *Sun Life*

*\* All time noted is in Atlantic Time.*





# WEDNESDAY SEPTEMBER 10 CONFERENCE DAY 2



## 11:45 AM – 1:30 PM WEDNESDAY LUNCHEON & CENTRE STAGE

### WEDNESDAY LUNCHEON

#### CENTRE STAGE

Join ACPM's leadership team for a live, interactive discussion on the issues that matter most.

Centre Stage offers a transparent look at ACPM's current priorities, strategic direction, and advocacy agenda.

It's your opportunity to raise key concerns, hear what's ahead, and be part of shaping the voice of Canada's retirement income industry.

## 1:45 PM – 3:00 PM PLENARY II

### NAVIGATING SUSTAINABLE INVESTING IN AN EVER-CHANGING ESG WORLD

Sweeping political changes in the United States and other major industrial economies in 2025 have had broad implications for the investment community. Several major financial institutions in Canada and across the globe have withdrawn from the Net Zero Banking Alliance. Numerous public companies are re-evaluating their diversity, equity, and inclusion objectives. Meanwhile, ESG-focused investment practices continue to face ongoing legal challenges.

Do pension funds find themselves at a crossroads with respect to their environmental, social and governance investment strategies, or is this simply a period of recalibration?

Please join us for a stimulating conversation exploring what these developments portend for pension funds and their members.

#### SPEAKERS

##### REINA BERLIEN

Senior Vice President,  
Head of Responsible Investment  
*Brandywine Global*

##### ROSALIE VENDETTE

Director  
*Quinn + Partners*

#### MODERATOR

##### ALISON SCHNEIDER

Principal  
*Encompass ESG Corporation*

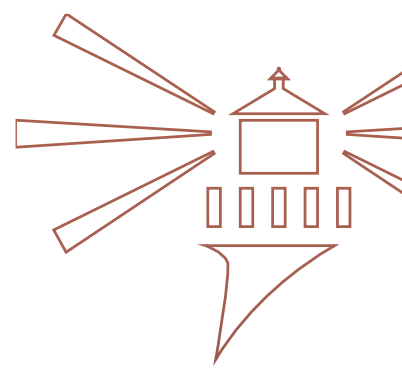
## 3:00 PM – 3:30 PM

### REFRESHMENT BREAK / SPONSOR SHOWCASE





# WEDNESDAY SEPTEMBER 10 CONFERENCE DAY 2



3:30 PM – 4:30 PM  
SPOTLIGHT ON ...  
**Althia Raj**



## SPOTLIGHT SPEAKER WITH ALTHIA RAJ

A seasoned political journalist and commentator, **ALTHIA RAJ** offers an insider’s take on Canadian politics, policy, and the shifting national conversation.

Known for her incisive interviews and thought-provoking analysis, Althia will share her perspectives on what’s really happening behind the headlines—insights that matter for anyone navigating retirement policy and planning in a rapidly evolving political landscape.



5:00 PM – 6:00 PM

## TRANSPORTATION TO PIER 21

6:00 PM – 9:30 PM  
WEDNESDAY  
EVENING

## WEDNESDAY EVENING AT PIER 21

Join us at **PIER 21** for a true Atlantic Canada experience—an evening of regional cuisine, historic atmosphere, and East Coast hospitality.

Located on the Halifax waterfront, the **CANADIAN MUSEUM OF IMMIGRATION AT PIER 21** is a national historic site that welcomed nearly one million immigrants to Canada between 1928 and 1971.

Explore this iconic venue while enjoying local flavours and connecting with fellow delegates in a setting that celebrates Canada’s rich cultural tapestry.

**It’s an evening to unwind, reflect, and embrace the spirit of the East Coast.**

PIER 21

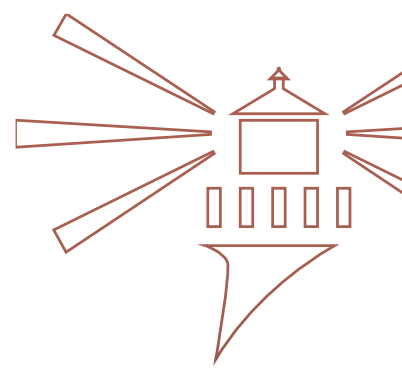


Canadian Museum of Immigration at Pier 21 / Musée canadien de l'immigration au Châlier 21





# THURSDAY SEPTEMBER 11 CONFERENCE DAY 3



7:30 AM – 4:30 PM

REGISTRATION / INFORMATION DESK — HALIFAX CONVENTION CENTRE

7:45 AM – 8:45 AM

BREAKFAST

8:45 AM – 10:00 AM  
PLENARY III

## ECONOMIC AND POLITICAL INSIGHTS AT HOME AND ABROAD: THE ROAD AHEAD FOR PENSION PLANS

This plenary will provide an overview of the economic environment and offer insights into the rapidly changing political landscape in Canada and abroad over the last year. The session will also explore the potential impacts of all these elements and what they mean for the Canadian retirement landscape.

**SPEAKERS**

**CLAIRE FAN**  
Senior Economist  
RBC

**STEPHEN McNEIL**  
Former premier of Nova Scotia

**MODERATOR**

**CHUCK BRUCE**  
CEO  
Provident<sup>10</sup>



10:00 AM – 10:30 AM

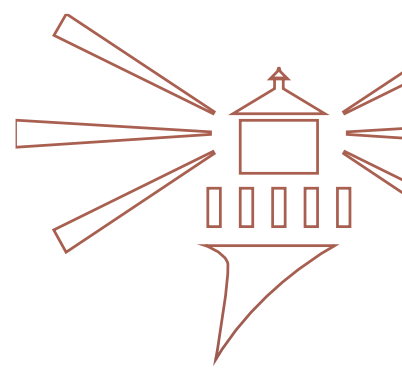
REFRESHMENT BREAK / SPONSOR SHOWCASE







# THURSDAY SEPTEMBER 11 CONFERENCE DAY 3



**10:30 AM – 11:30 AM  
CONCURRENT  
WORKSHOPS**



**11:45 AM – 1:15 PM  
THURSDAY  
LUNCHEON &  
SPECIAL LUNCHEON  
SPEAKER**

## WORKSHOP 4

### Digital Defense: Exploring Cyber Threats and Effective Breach Management

Cybersecurity threats are a significant concern for organizations as they can lead to data breaches, financial loss, and reputational damage. In this comprehensive workshop, participants will gain an understanding of the current cybersecurity landscape while learning practical strategies to protect their organizations from cyber threats.

#### SPEAKERS

**MATT SAUNDERS**, Counsel, *Borden Ladner Gervais*

**KIM SCHREADER**, Director, Cybersecurity Professional Services, *TELUS Communications*

#### MODERATOR

**JENNIFER URQUHART**, Chief Pension Officer, *Nova Scotia Health Employees' Pension Plan*

## WORKSHOP 5

### Mastering Pension Governance: Risk, Strategy & Success

Join an interactive Q&A panel discussion featuring experienced trustees, pension committee members, and industry professionals who will share their expertise on key governance challenges. Discussion topics will include succession planning, recruitment, strategic planning, and risk management, with a special focus on the new CAPSA Guidelines and emerging risks such as geopolitical uncertainty.

#### SPEAKERS

**SEAN HEWITT**, President and CEO, *Vestcor*

**ANA NUNES**, CEO, *APN Advisory Canada*

#### MODERATOR

**AMY PUN**, Associate Partner, Retirement and Benefits Solutions, *TELUS Health*

## WORKSHOP 6

### Tax & Pensions Uncovered: Insights from Finance Canada

Get the inside track on recent developments and current and emerging tax-related issues in pension and other deferred income plan regulation in Canada. This workshop will feature insights from Andrew Donelle, Senior Director, Tax Legislation Division at Finance Canada. For best results, come prepared with questions or consider submitting them in advance.

#### SPEAKER

**ANDREW DONELLE**, Senior Director, Tax Legislation Division, *Finance Canada*

#### MODERATOR

**ALLYSON MARTA**, Partner, *Bennett Jones*

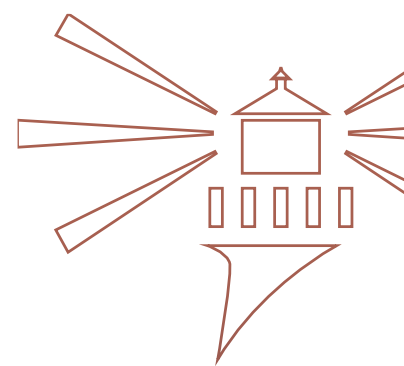
## THURSDAY LUNCHEON

### SPECIAL LUNCHEON SPEAKER

Stay tuned for an exciting announcement! Our Thursday luncheon will feature a dynamic keynote speaker who will share fresh perspectives and forward-looking ideas to inspire delegates and spark conversation. Details coming soon.



# THURSDAY SEPTEMBER 11 CONFERENCE DAY 3



**1:45 PM – 2:45 PM  
CONCURRENT  
WORKSHOPS**



**2:45 PM – 3:15 PM**

## WORKSHOP 7

### 7 Steps Toward Better CPP/QPP Claiming Decisions

When to claim benefits from the Canada Pension Plan (CPP) — or its Quebec counterpart, the Quebec Pension Plan (QPP) — is one of the most important retirement financial decisions Canadians will make. Dr. MacDonald will present the NIA’s newly released 8-part paper series to shift the paradigm toward more informed decision-making, marking the culmination of a multi-year, large-scale research effort investigating why so many retirees are missing out on this opportunity to enhance financial security in retirement. Its purpose is simple: to propose new ways to help Canadians understand and benefit from the value of delaying CPP/QPP benefits.

#### SPEAKER

**BONNIE-JEANNE MacDONALD**, Director of Financial Security Research, National Institute on Ageing, *Toronto Metropolitan University (formerly Ryerson University)*

#### MODERATOR

**PAUL LAI FATT**, Director, Pension Solutions, *CAAT Pension Plan*

## WORKSHOP 8

### Sleepless Over Compliance? The Legal Issues Keeping Plan Administrators Awake

From evolving regulatory frameworks to landmark court decisions, pension plan administrators face a continuously shifting legal landscape. This session will bring together top legal experts from across Canada to dissect the most pressing legal issues, emerging risks, and policy changes affecting plan administration. Gain valuable insights into how these developments could impact your organization and what you need to know to stay ahead of the curve.

#### SPEAKERS

**LEVEL CHAN**, Partner, *Stewart McKelvey*

**CLIO GODKEWITSCH**, Partner, *Goldblatt Partners LLP*

#### MODERATOR

**MARK GUITON**, CEO, *IWA-Forest Industry Pension & LTD Plans*

## WORKSHOP 9

### Financial Planning – Is that the Missing Link for Pension Plan Members?

Should pension plans leverage financial planning to drive better retirement outcomes? This strategic session explores the business case for integrating comprehensive planning services into pension offerings. Leading experts share insights on implementation, impact, and innovation:

- » Kiersten Amos examines the ROI and risk considerations;
- » Mila Babic reveals successful implementation strategies and measurable member benefits;
- » Tashia Batstone addresses regulatory framework and value creation through professional financial planning services for DB and DC pension plan members.

#### SPEAKERS

**MILA BABIC**, EVP and Chief Service Officer, *Ontario Pension Board*

**TASHIA BATSTONE**, CEO, *FP Canada*

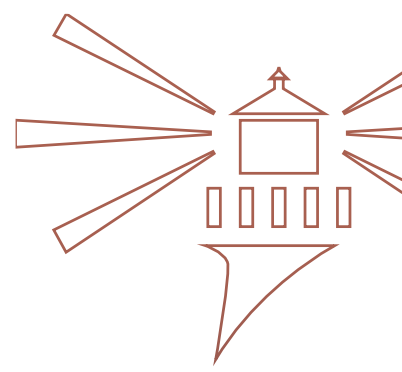
#### MODERATOR

**KIERSTEN AMOS**, Counsel, *McInnes Cooper*

## REFRESHMENT BREAK / SPONSOR SHOWCASE



# THURSDAY SEPTEMBER 11 CONFERENCE DAY 3



3:15 PM – 4:15 PM

CLOSING  
KEYNOTE WITH ...  
**Stephen Poloz**

### CLOSING KEYNOTE WITH STEPHEN POLOZ

Former Governor of the Bank of Canada **STEPHEN POLOZ** brings a wealth of insight into the global forces shaping Canada’s economic future.

With a rare ability to connect economic complexity to real-world implications, Stephen’s keynote will explore where the global economy is headed and what it means for retirement systems, investments, and policy.

*A powerful way to close the conference.*



4:15 PM – 4:30 PM

### CONFERENCE FINALE

6:30 PM – 7:30 PM  
GALA RECEPTION

### GALA RECEPTION

As the conference winds down, the celebration begins! Join fellow delegates and industry leaders for a festive reception before our Gala Dinner. Raise a glass, reminisce on the week’s highlights, and toast to the future of Canada’s retirement system—Halifax style.

7:30 PM – 10:00 PM  
GALA DINNER AND  
ENTERTAINMENT  
with Signal Hill

### GALA DINNER AND ENTERTAINMENT WITH SIGNAL HILL

Cap off your conference experience with an unforgettable evening of food, fun, and East Coast flair. Enjoy a delicious dinner followed by high-energy entertainment from **SIGNAL HILL**, Halifax’s legendary cover band. Their signature mix of rock, pop, and traditional favourites will have the dance floor buzzing.

*It’s the perfect finale to a week of learning, connection, and collaboration.*

*Signal  
Hill*



## ADDITIONAL INFORMATION

### CONFERENCE VENUE

All conference sessions and events will take place at the Halifax Convention Centre, located in the heart of downtown Halifax. Delegates are responsible for their own hotel arrangements. Visit [acpm.com](http://acpm.com) for full details on our recommended hotels that are located adjacent to the Convention Centre.

### ATTIRE

Business casual is appropriate for all daytime sessions. Wednesday evening is casual. Business or cocktail attire is recommended for Thursday's Gala Dinner and entertainment.

### CONFERENCE ID

Please wear your conference ID badge at all times. It is required for access to all conference-related activities. Lost badges can be replaced at the Registration Desk.

### DIETARY RESTRICTIONS

All dietary requirements must be noted on your registration form. While we will do our best to accommodate requests, we may be unable to fulfill new dietary requests made during the conference.

### CONTINUING EDUCATION CREDITS

Certificates of attendance will be provided and may be submitted to your professional association for CPD hours. For questions, contact your accrediting body.

### PLENARIES AND WORKSHOPS

To respect speakers and ensure sessions start on time, please be seated a few minutes prior to the scheduled start. Delegates may choose which workshop to attend—no pre-registration required.

### MOBILE DEVICES

Please silence your mobile devices during all conference sessions. If you need to take a call, step outside of the session room to avoid disruption.

### CANCELLATION POLICY

Cancellations received *in writing* by **Friday, July 18, 2025**, are eligible for a full refund (excluding golf and special activities). Between **July 19 and August 22, 2025**, a 50% refund applies. **No refunds after August 22, 2025.** Delegate substitutions are permitted. Hotel cancellations are subject to the Hotel's policy.

### PROGRAM CHANGES

ACPM reserves the right to adjust program details, session times, speakers, or venue locations as necessary.



## 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!"*

*A special Thank You to our  
DIAMOND SPONSOR*



Investor  
Services