

CANADIAN PENSION & BENEFITS INSTITUTE



Atlantic Regional Conference

White Point Beach Resort

Nova Scotia

October 5, 6 & 7, 2003

R E G I S T R A T I O N

Schedule at a Glance

Sunday, October 5

Golf	12:00 pm - 5:00 pm
Registration	11:00 am - 12:00 pm and 5:00 pm - 7:00 pm
Reception	7:00 pm
Lobster Dinner & Entertainment	7:30 pm

Monday, October 6

Breakfast & Registration	7:00 am
Conference Opening	8:15 am
Forum A	8:30 am - 9:30 am
Sessions 1 & 2	10:00 am - 10:45 am
Sessions 3 & 4	11:15 am - 12:00 pm
Lunch / Forum B	12:00 pm - 1:45 pm
Forum C	1:45 pm - 2:45 pm
Sessions 5 & 6	3:00 pm - 3:45 pm
Sessions 7 & 8	4:00 pm - 4:45 pm
Mussel Bake & Reception	6:00 pm - 7:30 pm
Dinner & Entertainment	7:30 pm

Tuesday, October 7

Breakfast	7:00 am - 8:30 am
Forum D	8:30 am - 9:30 am
Sessions 9 & 10	10:00 am - 10:45 am
Sessions 11 & 12	11:15 am - 12:00 pm
Lunch & Closing	12:00 pm

CPBI Regional Conference 2003

- **Bringing Your Spouse**

Your spouse is welcome to join you at the conference. The spouse fee includes breakfasts, lunches, dinners and the evening entertainment. Other outings are available and may be arranged by contacting White Point Beach Resort directly.

- **Accommodation**

You are responsible for arranging accommodation directly with White Point Beach Resort. Rooms and cottages are available but choice will be based on availability; book early! Please complete the separate enclosed form and return it to White Point Beach Resort by fax, or by phoning 800-565-5068. A deposit equal to one night's room rate is required by credit card. To view some of the Resort facilities, visit their website at www.whitepoint.com.

- **Attire**

Casual dress is appropriate for the entire conference and all events.

- **Transportation**

White Point Beach Resort is located approximately 90 minutes from Halifax and the Halifax International Airport. If you are traveling by car, it is located 228 miles (368 km) south west of the Nova Scotia & New Brunswick border. Follow Route 104 to Truro. Take Exit 15 to Route 102 to Halifax. Follow Route 103 to Exit 20A. White Point Beach Resort is 95 miles (152 km) southwest of Halifax on Route 103, Exit 20A.

Questions?

If you have any questions about the conference, please contact Maria Hayes:

Tel (902) 835-0391

Fax (902) 835-3628

cpbiatlantic@hfx.eastlink.ca

www.cpbi-icra.ca

Conference Speakers

• Forum A

Pulse on Plan Members

Lori Bak *Benefits Canada*

Do benefit and pension plans really attract and retain key talent in today's competitive workforce? Are plan members satisfied with their plans? Which benefits do they value most? Least? Benefits Canada magazine will answer these and other questions at this presentation featuring findings from the Pulse on Plan Members survey which comprises the views of 1,500 Canadian pension and benefit plan members on their attitudes and perceptions of their benefits plans.

• Forum B

Economic Growth & Upheaval- Positioning Ourselves for Success In An Uncertain World

Elizabeth Beale *Atlantic Provinces
Economic Council*

The presentation will highlight the evolution towards a knowledge-based economy in Atlantic Canada and discuss some of the factors and characteristics which are shaping these trends, such as demographic change and urban/rural shifts.

• Forum C

The Business Case For Mental Health

Michael Wilson *UBS Global Asset
Management*

The Honourable Michael Wilson will lay out the business action plan for mental health and the longer-term implications for benefits and pension managers. Mr. Wilson will discuss a long-term business and economic investment strategy to head off a current crisis in mental illness among breadwinners who will enter retirement 20 to 30 years from now.

• Forum D

The Five Ways HR Makes a Difference

Monica Belcourt *Human Resources
Professional Association of Ontario*

HR must be able to identify and evaluate its contribution to individual and organizational performance, or risk being outsourced or marginalized by other executives. In fact, HR does make a difference, and this difference can be documented. This presentation will provide a framework that measures the effectiveness and contribution of the HR function in five areas: compliance, client satisfaction, culture management, cost control and contribution to results-the *5C Model*.

Conference Sessions

• Session 1

Proceeds of Crime (Money Laundering) and Terrorist Financing Act: *How Does the Legislation and Regulations Impact Pension Funds and Their Service Providers?*

Alex Muto *RBC Global Services*

Money laundering is a multi-billion dollar problem, not just in Canada, but all over the world. Criminals have learned to take advantage of the mainstream financial system to disguise the origin of their ill-gotten gains and reintegrate their profits into the legitimate economy. Canada has enhanced its own Proceeds of Crime (Money Laundering) and Terrorist Financing Act and has put in place laws and regulations requiring its citizens and financial institutions to take appropriate steps to report suspicious and prescribed transactions.

• Session 2

The Changing Pharmaceutical Landscape

Linda Hughes *ESI Express Scripts*

This course provides a retrospective review of the pharmaceutical landscape from 1950, and forecasts growth to

2010. Beginning with a sociopolitical and socioeconomic analysis of the US, we will then look at the Canadian pharmaceutical landscape for the same period, and discuss factors that are influencing the escalating cost of drugs.

• Session 3

Defined Contribution Benefit Plans

Eleanor Marshall *Aliant*

Every employee in a DC plan wants to be treated fairly, but each has a different opinion of what fair is. Further, every employer of a DC plan wants to do the right thing; so how do you balance all these needs? Find out how one employer sought to provide the best solution to their employees. In this Case Study, Eleanor will discuss the challenges her team faced as they attempted to answer these challenges, after a multi-company merger left her team responsible for numerous benefit programs of different types.

• Session 4

Adopt a New Drug Plan Management Approach

Johanne Brosseau *AON Consulting Inc*

Prescription drugs are one of the primary

reasons for increases in employee benefit costs. You cannot properly manage them without understanding what's in your "drug grocery basket" and who fills it up. This presentation will demonstrate how in-depth analysis of your prescription drug plan experience can help create a plan that reflects your situation, promotes the health of individuals, and changes the way you buy employee benefits plans.

• Session 5

Socially Responsible Investing in a Shifting Pension Landscape

Michael Jantzi *Michael Jantzi Research Assoc. Inc*

Fiduciaries overseeing pension assets no longer have the luxury of ignoring the social and environmental context of the companies in their portfolios. Mr. Jantzi will highlight international trends and practices in SRI and what this means for pension plans in Canada. He will provide an overview of SRI and fiduciary duty, and explain why SRI research strengthens traditional financial analysis, which has led to the debunking of the myth that SRI does not provide competitive bottom line returns.

• Session 6

Creating a Healthy Workplace in Capital Health

Maura Davies *Capital District Health*

As part of its commitment to improving the health of individuals and communities, Capital District Health has identified creation of a healthier workplace as one of its strategic priorities. Using a population health approach, Capital District Health has established a comprehensive plan to improve the health and satisfaction of its 10,000 staff, physicians and volunteers, improve staff recruitment and retention, and meet the National Quality Institute standards for a healthy workplace. This session will provide an overview of the healthy workplace strategy, progress to date, and lessons learned.

• Session 7

Investment Diversification: Why, How and How Much is Enough?

Patrick Walsh *SEI Investments*

Where once the 'hot topic' was *Active* vs. *Passive*, the buzz word for today's markets is *Diversification*. Asset Class *Diversification*, Style *Diversification*, Size *Diversification*, and Manager *Diversification*; this presentation will

discuss each of these four levels of diversification and their importance in today's investing marketplace.

• Session 8

An Employer's Success Story

Jane Wellman *Employee Wellness Services*
Fernand Ouellette *New Brunswick Power*

New Brunswick Power's efforts in prevention, early intervention, and support have contributed to no increase in Long Term Disability rates since April 1999, and a tremendous turnaround in the funding of that Plan. This session will provide information on New Brunswick Power's positive experience with wellness initiatives and plan management.

• Session 9

The Role of Alternative Investments in an Era of Diminishing Returns & Integration of Hedge Funds into the Current Asset Mix

John Motherwell *Hillsdale Investments*

Will the conventional asset mix be able to deliver the returns and level of risk that are required by the plan in the future? This presentation will examine the existing asset mix and the additive benefits of non-correlated assets. It will

explore the separation of alpha from beta as a positive first step and the ongoing search for alpha and alpha transport. Non-correlation is important but are there other benefits?

• Session 10

Communication Conundrum?

Trevor Weldon *Casino Nova Scotia*

Casino Nova Scotia's Human Resources team was tasked with communicating their new "Full House Flex Plan" benefit package to their 1500 employees. No big deal you say? Well, take this into account:

- *Their employee population is as ethnically and culturally diverse as you would encounter anywhere.*
- *Casino Nova Scotia consists of three properties separated by hundreds of miles.*
- *The new plan was complex and flexible when the old was basic and flat.*
- *Casino Nova Scotia employees are as educationally diverse as could be found.*
- *In 17 years there had never been a single change to the benefits plans.*

Find out how Casino Nova Scotia took on this challenge and won a national communication award in the process.

• **Session 11**

**Riding the Scales of Justice:
Pension Plans, the Courts
and Regulators**

Hugh Wright *McInnis Cooper*

The legal landscape within which pension plan sponsors and administrators must operate is in a constant state of change. Pension plan sponsors and administrators must cope with changing legislative and regulatory requirements, court decisions interpreting these requirements and increasing fiduciary duties imposed on sponsors and administrators by the courts. This presentation will review recent statutory and regulatory developments and recent court decisions. Overall trends in pension litigation will be discussed, as well as steps which plan sponsors and administrators can take to either avoid litigation or, if litigation is inevitable, protect their positions.

• **Session 12**

**Effective Governance of Health
and Welfare Plans**

Michael Wolpert *Towers Perrin*

Given the significant investment made by organizations in the design and operation of health and welfare plans, surprisingly little attention has historically been paid to governance of these plans. However, the short and long term risks associated with health and welfare plans can be substantial. This session will explore both how and why organizations should implement effective governance of their health and welfare plans.

**Featured
Entertainment-
Tony Quinn
on Sunday Night**

Tony Quinn can be best described as a renaissance entertainer. He is one of the very few who can accomplish all that he does - alone on stage. Tony has been in the entertainment business for over 20 years, and will perform for us on Sunday night. We'll see you there!



If you have any questions please contact Maria Hayes:

Tel (902) 835-0391

Fax (902) 835-3628

email: cpbiatlantic@hfx.eastlink.ca

REGISTRATION 2003 CPBI Atlantic Regional Conference • October 5, 6 & 7, 2003

LAST NAME FIRST NAME ORGANIZATION

ADDRESS

CITY PROV POSTAL CODE

PHONE (Office) FAX EMAIL (for conference confirmation) PHONE (Home - for emergencies only)

SPECIAL DIETARY NEEDS FOR DELEGATE

SPECIAL DIETARY NEEDS FOR SPOUSE

REGISTRATION FEES Please indicate and total applicable fees

Conference Fee (includes conference program and meals)

Early Bird Registration (before June 9th)	Member \$495.00 ☐	Non Member \$595.00 ☐	\$
After June 9th	Member \$595.00 ☐	Non Member \$695.00 ☐	\$

Spouse Fee

Spouse Fee Including all entertainment and conference meals \$155.00 ☐ \$

Golf Fee

Yes, I wish to play in the golf tournament (complete separate registration page) \$65.00 ☐ \$

SUB TOTAL \$

ADD 15% TAX \$

TOTAL \$

HST #889721007

COURSE SELECTION 2003 CPBI Atlantic Regional Conference

LAST NAME

FIRST NAME

SESSIONS

Please choose ONE session below each time slot

	Monday 10:00 am to 10:45 am	Monday 11:15 am to 12:00 pm	Monday 3:00 am to 3:45 pm	Monday 4:00 am to 4:45 pm	Tuesday 10:00 am to 10:45 am	Tuesday 11:15 am to 12:00 pm
1 Anti-Money Laundering & Terrorist Financing Act _____	☐					
2 The Changing Pharmaceutical Landscape _____	☐					
3 Defined Contribution Benefit Plans _____		☐				
4 Adopt a New Drug Plan Management Approach _____		☐				
5 Socially Responsible Investing (SRI) _____			☐			
6 Creating a Healthy Workplace in Capital Health _____			☐			
7 Investment Diversification: Why, How and How Much is Enough? _____				☐		
8 An Employers Success Story _____				☐		
9 Role of Alternative Investments in an Era of Diminishing Returns _____					☐	
10 Communication _____					☐	
11 Pension Plans, the Courts and Regulators _____						☐
12 Effective Governance of Health and Welfare Plans _____						☐

Please fax all registration pages to Maria Hayes, and mail your originals together with your cheque to:

Canadian Pension & Benefits Institute

c/o Maria Hayes, Suite 100-430 Sunnyside Place, 1600 Bedford Highway, Bedford, NS, B4A 1E8

Tel (902) 835-0391 • Fax (902) 835-3628 • email: cpbiatlantic@hfx.eastlink.ca

Please Note: Cancellations received prior to September 2 will be refunded in full. Cancellations received after that date will be refunded 50% of the registration fee or a substitution may be made for no cost.

GOLF REGISTRATION 2003 CPBI Atlantic Regional Conference

LAST NAME

FIRST NAME

ORGANIZATION

• Rules

The tournament will be run as a scramble event. All players tee off at 12:00pm sharp. Choose best shot, all players play next shot from that spot (within 1 club length). Continue until ball is holed out. Maximum 2 putts per hole.

• Teams

Teams will be set by the CPBI Golf Committee, balanced by handicaps. No team entries accepted.

Your RCGA handicap _____

Your lifetime best score _____

• Power Carts

This is a walking tournament. If you cannot walk 18 holes, please indicate on your registration form that you require a power cart. The course has only 6 power carts so please only request a cart if absolutely necessary.

Submit this form with your registration.

Golf club and power cart rentals are limited. If you can not bring clubs, please indicate club requirement:

	LEFT HAND	RIGHT HAND
Male	☐	☐
Female	☐	☐

Yes, I require a cart ☐

HOTEL ACCOMMODATIONS
2003 CPBI Atlantic Regional Conference

White Point Beach Resort

LAST NAME

FIRST NAME

ORGANIZATION

ADDRESS

CITY

PROV

POSTAL CODE

PHONE (Office)

FAX

EMAIL

Rooms and cottages are reserved for conference delegates at the following rate per night (before tax). Please indicate the accommodation you prefer.

Note that there are a limited number of cottages ~ first come, first served. Reservations must be guaranteed with a deposit equal to one night's room rate & tax.

	Rate Per Person
☐ Room with Single Occupancy	\$105
☐ Room with Double Occupancy	\$55
☐ Cottage with Single Occupancy	\$120
☐ Cottage with Double Occupancy	\$65

CREDIT CARD NUMBER

EXPIRY DATE

CREDIT CARD NAME

SIGNATURE

If you selected double occupancy, please indicate the name of the other occupant:

OTHER OCCUPANT

Please complete this form and return it to the Resort by fax to (902) 354-7278. Alternatively, you may call directly (902) 421-1569 or 800-565-5068.

** Please advise the reservations desk that you are part of the CPBI Conference to obtain the reduced rate.*