

"Excellent program. It provides comprehensive and current developments and challenges in pension law. I really appreciate the in-depth expertise of the panelists."

Patricia Pacanchique, Director, Pension Policy, OMERS



The Osgoode Certificate in Pension Law

A comprehensive and practical program for those giving advice or making decisions on corporate/institutional pension issues

WEBCAST
AVAILABLE

February 15 - March 29, 2017 | 6 Days over 6 Weeks | Toronto, Canada

Benefits and Pensions
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OSGOODE
OSGOODE HALL LAW SCHOOL
PROFESSIONAL
DEVELOPMENT

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Program Details

Dates

Module 1

The Retirement Savings System
February 15, 2017

Module 2

Pensions and the Employment
Relationship
February 22, 2017

Module 3

Assets and Liabilities: The Funding and
Investment of Pension Plans
March 1, 2017

Module 4

Pensions in Corporate Transactions
and Restructuring
March 8, 2017

Module 5

Pension Governance and Risk
Management
March 22, 2017

Module 6

Pension Reform
March 29, 2017

The program will be held at the
Osgoode Professional Development
Centre located in Downtown Toronto.

For Further Program-Related Information

Please contact:
Reheleh Pourkhodayar
Program Lawyer
at 416-619-9351 or email
reheleh@osgoode.yorku.ca

WEBCAST
AVAILABLE

Do you have the practical knowledge and skills you need to make decisions concerning pension matters?

Pension law and regulation is complex, technical and, to the unwary, a minefield of potential liability. The list of "must know" topics seems endless: difficulties in dealing with shortfalls in funding; problems with handling plans during mergers, acquisitions and takeovers; multi-employer plans; governance and risk management issues; the complex technical and practical issues involved in insolvency situations; and the growth of class actions. In addition, employment law and human rights considerations in the pensions context are becoming all the more apparent, while concerns about pension law reform and the very future of pensions themselves remain front and centre.

As a lawyer, pensions professional, CFO, HR Manager, Consultant or executive sitting on a pension committee, you may be called upon to give advice on or make decisions concerning pension issues. It is critical that you have an understanding of the key issues and their implications. The *Osgoode Certificate in Pension Law*, now in its 7th year, was developed to provide a comprehensive overview and analysis of the major areas of pension law and practice. This ground-breaking program was developed and, is taught by, acknowledged experts in the pension field who will equip you with the knowledge, insights, strategies and tactics you need in your day-to-day work.

What You Will Learn

- Pension governance and risk management
- Savings and investment over the life cycle – overview of the role of pensions
- A review of the regulatory framework
- Pension plans and the employment relationship – key areas of concern
- Pension investment principles
- Asset liability studies
- Conversion of DB to DC – key legal and structural considerations
- MEPPS and other multiple employer plans
- Pensions in corporate transactions and restructuring – the principal considerations
- Key strategies to manage plans during insolvency
- Increasing class action activity concerning plan deficits – what you need to know
- Pension litigation – the landmark cases
- Essential information about important pension reform initiatives across Canada

Who Should Attend

- Pension Plan Administrators, Managers and Sponsors
- Directors and Managers of Pension and Benefits
- Pension Lawyers in Private Practice
- In-House Counsel
- Members of Pension Boards and Investment Committees
- Financial Officers and Directors
- HR Directors and Vice Presidents
- Pension and Benefits Consultants
- Investment and Compensation Consultants
- Provincial and Federal Pension Regulators
- Advocates for Retirees



THE OSGOODE CERTIFICATE IN PENSION LAW

This program is designed for lawyers, pension professionals, CFOs, HR Managers and others whose work may call upon them to give advice or make decisions on pensions. Over six intensive one-day modules, an expert faculty will deliver the key concepts of pension law and practice. There will be an emphasis on the practical, and classes will be taught using a blended-delivery method that includes lectures, panel discussions and case studies.

THE CURRICULUM

MODULE 1

Wednesday, February 15, 2017, 9:00 a.m. – 4:00 p.m.

The Retirement Savings System

- Saving and investing over the life cycle – the role of pensions
- Registered Pension Plans
 - Defined benefit and contribution
 - Multi-employer
 - Jointly sponsored
 - Public sector
- Canada/Quebec Pension Plan and OAS
- Supplementary Pension Plans
- Tax-Assisted Non-Pension Retirement Savings Plans
- Regulatory framework – principal areas of legislation
 - Pension legislation
 - Income and Commodity tax legislation
 - Employment standards
 - Human rights
- Trust principles and emerging case law on fiduciary obligations
- Overview of taxation pension plans and retirement savings plans: the integrated system of tax assisted retirement savings – how pension plans and RRSs work together under income tax laws
- Best practices and innovation in plan administration and service

Keynote Luncheon Address

John M. Solursh, Member, Financial Services Tribunal of Ontario;
Partner Emeritus Pension and Employee Benefits Group, Blake Cassels
& Graydon LLP

Faculty

Tracy Abel, Vice President, Client Services, Ontario Teachers' Pension Plan

Mark Eagles, Principal, Mercer

Mark Newton, Newton HR Law

Lyle Teichman, Willis Towers Watson

Deron Waldoock, Senior Vice President, Canadian Legal Consulting Practice,
Aon Hewitt

MODULE 2

Wednesday, February 22, 2017, 9:00 a.m. – 4:15 p.m.

Pensions and the Employment Relationship

- Pensions in the non-union workforce
 - Basic principles of the employment relationship
 - Pensions as part of total compensation

- Changing terms of employment
- Termination of the employment relationship

- Pensions in collective bargaining
 - Employer-union-employee relationship
 - Incorporation of pension plan into a collective agreement
 - Jurisdictional issues: arbitrator, pension regulator, courts
- Employment standards and human rights considerations

Faculty

John D. R. Craig, Fasken Martineau DuMoulin LLP

Clio Godkewitsch, Koskie Minsky LLP

Lewis Gottheil, Director, Legal Department, Unifor

Sean Maxwell, Blake, Cassels & Graydon LLP

John Prezioso, Hicks Morley Hamilton Stewart Storie LLP

MODULE 3

Wednesday, March 1, 2017, 9:00 a.m. – 4:30 p.m.

Assets and Liabilities: The Funding and Investment of Pension Plans

- Funding requirements in pension and income tax legislation
- Types of actuarial reports
- Basic actuarial principles, assumptions and methods
- Going concern funding, solvency funding, wind-up funding
- Pension accounting, financial statements
- Pension investment principles
- Regulatory requirements and reform of pension fund investment regulations
- Relevance of income tax restrictions to investments by pension funds
- Prudent person
- Risk management and investment strategies
- Asset liability studies
- Conversion of DB to DC – legal and structural considerations
- Different types of DC plans and administration/communication challenges with DC plans
- MEPPS and other multiple employer plans
- Governance of Unionized MEPPS

Keynote Luncheon Address

Susan Bird, B.A. CEBS, ICD.D. – President of McAteer Group of Companies

Faculty

Scott Cushing, Principal, Mercer

Mark Firman, McCarthy Tétrault LLP

Zev Frishman, Chief Investment Officer, Morneau Shepell Asset and Risk Management Ltd.

Lorraine Gignac, Principal, Mercer

Jeffrey Sommers, Blake, Cassels & Graydon LLP

MODULE 4

Wednesday, March 8, 2017, 9:00 a.m. – 3:45 p.m.

Pensions in Corporate Transactions and Restructuring

- The different insolvency or restructuring mechanisms and how they impact on pension plans- restructuring, financing, receivership, bankruptcy
- CCAA, BIA
- PBGF
- Structure and purpose of a deal
- Share and asset transactions
- Division or merger of pension plans (DB/DC)
- Due diligence
 - Plan documents
 - Actuarial reports
 - Accounting reports, financial statements
- Reqs, warranties, covenants and indemnities

Faculty

Andrea Boctor, Stikeman Elliott LLP

Jessica Bullock, Davies Ward Phillips & Vineberg LLP

Douglas Rienzo, Osler, Hoskin & Harcourt LLP

Susan Nickerson, Torys LLP

MODULE 5

Wednesday, March 22, 2017, 9:00 a.m. – 4:30 p.m.

Pension Governance and Risk Management

- Basic principles
- Statutory framework
- Common law principles
- Types of risk
- Governance models: single employer; multi-employer; new model
 - Jointly governed target benefit plan
- Governance policies (funding, expenses, record keeping, etc.)
- Agents and service providers
- Special considerations for DB plans and DC plans

Keynote Luncheon Address

Harry Smorenberg, CEO, Smorenberg Corporate Consultancy, Founder, WorldPensionSummit & Member, P&I Advisory Board

Faculty

Cynthia Crysler, Senior Vice President, Pension Policy and Research, OMERS

Heather Di Dio, Dentons Canada LLP

Lorena Gepraegs, Senior Associate Legal Counsel & Privacy Officer, Health-care of Ontario Pension Plan (HOOPP)

Natasha Gidaro, Pepsico Foods Canada

Mariana MacIntosh, Senior Legal Counsel, Ontario Teachers' Pension Plan

Kim Ozubko, Miller Thomson LLP

Susan G. Seller, Bennett Jones LLP

Bethune Whiston, Partner, Morneau Shepell

MODULE 6

Wednesday, March 29, 2017, 9:00 a.m. – 4:45 p.m.

Pension Reform

Pension law across Canada has undergone major transformations in recent years. In this final module, experts from across Canada will review the new regimes and explain the significance of those changes for all pension specialists.

- *The Pension Benefits Standards Act* and what it means for pension law in British Columbia and Alberta
- The distinctiveness of the Quebec pension law regime, including the role of pension committees, solvency funding extensions and the different treatment of multi-employer pension plans
- Pension Reform
- Jointly-Sponsored Pension Plans and Ontario Public Sector Pensions

Keynote Luncheon Address

Keith Ambachtsheer, Director Emeritus, Rotman International Centre for Pension Management, Rotman School of Management, University of Toronto and President and Founder, KPA Advisory.

Faculty

Karen DeBortoli, Director, Pension & Benefit Research, Eckler Ltd.

Tina Hobday, Langlois Lawyers

Evan Howard, Vice President, Pension Management, CAAT Pension Plan

Scott Sweatman, Dentons Canada LLP

Note: There will be a take-home assignment at the end of Module 6.



The *Osgoode* Certificate in Pension Law draws on the expertise and experience of leading pension and legal experts, including:

Tracy Abel, Vice President, Client Services,
Ontario Teachers' Pension Plan

Keith Ambachtsheer, Director Emeritus, Rotman
International Centre for Pension Management,
Rotman School of Management, University of
Toronto; President & Founder, KPA Advisory

Susan Bird, B.A. CEBS, ICD.D., President,
McAteer Group of Companies

Andrea Bector, Stikeman Elliott LLP

Jessica Bullock, Davies Ward Phillips &
Vineberg LLP

John D. R. Craig, Fasken Martineau DuMoulin LLP

Cynthia Crysler, Senior Vice President, Pension
Policy and Research, OMERS

Scott Cushing, Principal, Mercer

Karen DeBortoli, Director, Pension & Benefit
Research, Eckler Ltd.

Heather Di Dio, Dentons Canada LLP

Mark Eagles, Principal, Mercer

Mark Firman, McCarthy Tétrault LLP

Zev Frishman, Chief Investment Officer, Morneau
Shepell Asset and Risk Management Ltd.

Lorena Gepreags, Senior Associate Legal
Counsel & Privacy Officer, Healthcare of Ontario
Pension Plan (HOOPP);

Natasha Gidaro, Pepsico Foods Canada

Lorraine Gignac, Principal, Mercer

Clio M. Godkewitsch, Koskie Minsky LLP

Lewis Gottheil, Director, Legal Department,
Unifor

Tina Hobday, Langlois Lawyers

Evan Howard, Vice President, Pension
Management, CAAT Pension Plan

Mariana MacIntosh, Senior Legal Counsel,
Ontario Teachers' Pension Plan

Sean Maxwell, Blake, Cassels & Graydon LLP

Mark Newton, Newton HR Law

Susan Nickerson, Torys LLP

Kim Ozubko, Miller Thomson LLP

John Prezioso, Hicks Morley Hamilton
Stewart Storie LLP.

Douglas Rienzo, Osler, Hoskin & Harcourt LLP

Susan G. Seller, Bennett Jones LLP

John M. Solursh, Member, Financial Services
Tribunal of Ontario; Partner Emeritus Pension
and Employee Benefits Group, Blake Cassels &
Graydon LLP

Harry Smorenberg, CEO, Smorenberg Corporate
Consultancy; Founder, World-PensionSummit &
Member, P&I Advisory Board

Jeffrey Sommers, Blake, Cassels & Graydon LLP

Scott Sweatman, Dentons Canada LLP

Lyle Teichman, Lawyer and Senior Consultant
Willis Towers Watson

Deron Waldock, Senior Vice President, Canadian
Legal Consulting Practice, Aon Hewitt

Bethune Whiston, Partner, Morneau Shepell

"I am in-house counsel and I have been asked to advise the pension committee with very little background in pension law. This program has provided a great foundation for future learning and development. I would highly recommend it to others involved in pension administration."

Kendell Wilde, Legal Counsel, Babcock & Wilcox Power Generation Canada Corp.

"This entire program has been excellent! As a manager in accounting who primarily advises on plan administration, I will be able to use this information to better advise plan members."

Michael Humphries, Manager, Accounting Services, ETFO

ADVISORY BOARD

PROGRAM DIRECTORS

Mark Newton
Newton HR Law

Jeff Sommers
Blake, Cassels & Graydon LLP

ADVISORY BOARD

The Honourable Justice Eileen E. Gillese
Court of Appeal for Ontario; former
Dean of Law, Western University and
Pensions Law Professor

David Gordon
Deputy Superintendent, Pensions
Financial Services Commission of
Ontario (retired)

Janet Downing
Lawyer/Senior Consultant, Towers
Watson (retired)

Malcolm Hamilton
Senior Fellow, C.D. Howe Institute

John M. Solursh
Member, Financial Services Tribunal of
Ontario; Partner Emeritus Pension and
Employee Benefits Group, Blake Cassels
& Graydon LLP

John Poos
Vice President, Pensions and Benefits,
George Weston Ltd. and Loblaw
Companies Ltd.

Mark Zigler
Koskie Minsky LLP

**THE OSGOODE CERTIFICATE
IN PENSION LAW
WINTER 2017 REGISTRATION**

**Don't miss this intensive, practical
program, covering all of the key issues
and major developments in pension law**

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Fee Per Delegate

\$3,795 plus HST

Fees include attendance, program materials, continental breakfast, lunch and refreshments for each of the six days of the program. The price does not include accommodations. Please inquire about group discounts and financial assistance. Payment plan details below. Dress is business casual.

Need accommodations? Check our website at www.osgoodepd.ca/hotels-and-parking

Payment Options – Payment must be made prior to the program

- ☐ Cheque enclosed (payable to York University – HST/GST# R119306736)
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OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSUC.



Eligible CPD/MCLE hours:

LSUC (ON): 38.75 CPD Hours
(3.0 Professionalism; 35.75 Substantive)

OsgoodePD programs may be eligible for CPD/MCLE credits in other Canadian jurisdictions. To inquire about credit eligibility, please contact cpd@osgoode.yorku.ca.

Program Changes

We will make every effort to present the certificate program as advertised, but it may be necessary to change the dates, location, speakers or content with little or no notice. In the event of program cancellation, York University and Osgoode Hall Law School's liability is limited to reimbursement of paid fees.

Cancellations/Rainchecks/Substitutions

If you are unable to attend the program your organization may name a replacement. A full refund will be issued for cancellations received a minimum of 21 days before the program start date. Written cancellations received after January 26, 2017 will include an administration charge of \$150. Non-attendance or withdrawal after the program start date will incur a full program fee. Payment must be received by February 1, 2017.

Location

Osgoode Professional Development
Downtown Toronto Conference Centre
1 Dundas St. W., 26th Floor, Toronto, ON, M5G 1Z3

Certificate of Program Completion

You will receive a certificate upon completion of *The Osgoode Certificate in Pension Law*. Participants must attend all program modules and pass the take-home assignment to receive a certificate.

Public CLE Seminars

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Skills Training & Certification

ITAW

Professional LLM

4 Convenient Ways to Register

1. **MAIL** your registration form to:
Osgoode Professional Development
Downtown Toronto Conference Centre
1 Dundas St. W., 26th Floor
Toronto, ON M5G 1Z3
2. **ONLINE** at www.osgoodepd.ca/pensionlaw
3. **FAX** your registration to 416.597.9736
4. **CALL US** at 416.597.9724

