“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
Elementary Teachers’ Federation of Ontario

The Osgoode Certificate in Pension Law

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

February 2 - March 9, 2016 | 6 Days over 6 Weeks | Toronto, Canada
Do you have the practical knowledge and skills you need to confidently make decisions on 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 funding shortfalls; challenges 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 increasingly at issue, 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 must be able to advise on and make decisions concerning pension issues. To do so effectively and with confidence, it is critical that you have a solid understanding of the key issues and their implications. The Osgoode Certificate in Pension Law, now in its sixth year, was developed to provide professionals like you with a comprehensive overview and analysis of the major areas of pension law and practice.

This ground-breaking program was developed by, and is taught by acknowledged experts in the pension field who will equip you with the core knowledge, insights, practical strategies and tactics you need in your day-to-day work.

What You Will Learn

- 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
- Pension governance and risk management
- 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

Over six intensive one-day modules, an expert faculty will equip you with the key concepts of pension law and practice. The emphasis is on the practical, and classes are taught using a blended-delivery method that includes lectures, panel discussions and case studies.

THE CURRICULUM

MODULE 1
Tuesday, February 2, 2016, 9:00 a.m. – 4:30 p.m.

The Retirement Savings System
- Saving and investing over the life cycle – the role of pensions
- Registered Pension Plans
  - defined benefit
  - defined 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 tax legislation
  - commodity tax legislation
  - employment standards
  - human rights
- Trust principles and emerging case law on fiduciary obligations
- Overview of taxation of pension plans and retirement savings plans: the integrated system of tax assisted retirement savings – how pension plans and RRSPs work together under income tax laws
- Best practices and innovation in plan administration and service

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 Services Ltd.

Faculty
Mark Eagles, Principal, Mercer
Mark Newton, Newton HR Law
Deron Waldock, Senior Vice President, Canadian Legal Consulting Practice, Aon Hewitt
David Wentzell, McMillan LLP
Tracy Abel, Vice President, Client Services, Ontario Teachers’ Pension Plan

“Excellent... very good stuff. This is what I came for.”
Andrea Kreutzer, Vice President, Group Retirement Solutions, People Corporation

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MODULE 2
Tuesday, February 9, 2016, 9:00 a.m. – 4:15 p.m.

Pensions and the Employment Relationship / Pensions in Corporate Transactions and Restructuring
- Pensions in collective bargaining
  - employer-union-employee relationship
  - incorporation of pension plan into a collective agreement
  - jurisdictional issues: arbitrator, pension regulator, courts
- 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
- Reps, warranties, covenants and indemnities

Faculty
Jessica Bullock, Davies Ward Phillips & Vineberg LLP
John D.R. Craig, Fasken Martineau DuMoulin LLP
Lewis Gottheil, Law Office of Lewis Gottheil
Susan Nickerson, Torys LLP
Douglas Rienzo, Osler, Hoskin & Harcourt LLP

MODULE 3
Tuesday, February 16, 2016, 9:00 a.m. – 4:00 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
- Investment strategies

Register online today at www.osgoodepd.ca/pensionlaw
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
- Jointly-Sponsored Pension Plans and Ontario Public Sector Pensions

Faculty

Natalie Bussière, Blake, Cassels & Graydon LLP
Karen DeBortoli, Director, Pension & Benefit Research, Eckler Ltd.
Evan Howard, Director of Policy, 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 and President and Founder, KPA Advisory Services Ltd.
Andrea Doctor, Stikeman Elliott LLP
Jessica Bullock, Davies Ward Phillips & Vineberg LLP
Natalie Bussière, Blake, Cassels & Graydon LLP
John D. R. Craig, Fasken Martineau DuMoulin LLP
Scott Cushing, Principal, Mercer
Karen DeBortoli, Director, Pension & Benefit Research, Eckler Ltd.
Mark Eagles, Principal, Mercer
Mark Firman, McCarthy Tétrault LLP
Lorraine Gignac, Principal, Mercer
Lewis Gottheil, Law Office of Lewis Gottheil
Andrew J. Hatnay, Koskie Minsky LLP
Evan Howard, Director of Policy, CAAT Pension Plan
Terra L. Klinck, Hicks Morley Hamilton Stewart Storie LLP
Sean Maxwell, Blake, Cassels & Graydon LLP
David L. Miller, General Counsel and Senior Vice President, Governance, Healthcare of Ontario Pension Plan
Mark Newton, Newton HR Law
Susan Nickerson, Torys LLP
Susan Philpott, Koskie Minsky LLP
Mary M. Picard, Dentons Canada LLP
John Poos, Vice President Pensions and Benefits, George Weston Ltd. And Loblaw Companies Ltd.
Douglas Rienzo, Osler, Hoskin & Harcourt LLP
Susan G. Seller, Bennett Jones LLP
Anne Slivinskas, Associate General Counsel and Director, Pension Law and Policy Group, Ontario Teachers’ Pension Plan
Jeffrey Sommers, Blake, Cassels & Graydon LLP
Scott Sweatman, Dentons Canada LLP
Deron Waldock, Senior Vice President, Canadian Legal Consulting Practice, Aon Hewitt
David Wentzell, McMillan LLP
Bethune Whiston, Partner, Morneau Shepell

“The speakers were very knowledgeable, approachable and covered a wide variety of topics. Will recommend this program.”
Laura Stefan, Osler, Hoskin & Harcourt LLP

“I really enjoyed the details of the course. It was a fantastic reminder for one who has worked in pensions for a very long time.”
Patricia Roberts, CIBC Mellon

Register online today at www.osgoodepd.ca/pensionlaw
THE OSGOODE CERTIFICATE IN PENSION LAW
WINTER 2016 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
$3795 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.

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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 12, 2016 will include an administration charge of $700. Non-attendance or withdrawal after the program start date will incur a full program fee. Payment must be received by January 25, 2016.

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.

Eligible CPD/MCLE hours:
LSUC (ON): 38.75 CPD Hours (3.0 Professionalism; 35.75 Substantive); NY CLE Board: 42.5 credit hours in the Area of Professional Practice for Transitional and Non-Transitional Lawyers.

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4 Convenient Ways to Register
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   Downtown Toronto Conference Centre  
   1 Dundas St. W., 26th Floor  
   Toronto, ON M5G 1Z3
2. **ONLINE** at www.osgoodepd.ca
3. **FAX** your registration to 416.597.9736
4. **CALL US** at 416.597.9724 or 1.888.923.3394