Get a comprehensive and practical grounding in key pension issues, so that you can advise and act with confidence.

Designed and taught by Canada’s leading pensions experts, this unique program will provide you with the key knowledge, practical strategies and guidance you need to succeed in the complex world of pensions.

Delve into:
• Governance and risk management issues
• Pension funding requirements and investment principles
• Pension reform across Canada: the new regimes and their implications
• Problems with handling plans during mergers, acquisitions and takeovers

Register today at:
osgoodepd.ca/pensionlaw
Who Should Attend?

- Pension plan administrators, managers and sponsors
- Members of pension plan boards of trustees
- Pension lawyers in private practice
- In-house counsel
- Members of pension 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

Topics Include:

- Assets and Liabilities: Pension plan funding and investment
- Taxation of pension plans and retirement savings plans
- Defined Contribution Plans: the CAP guidelines and CAPSA DC plans guidelines
- Labour, employment, human rights and privacy law issues in pensions
- Pension issues in insolvencies and restructurings
- Pension plan governance and managing Board risk
- Single-employer, multi-employer, jointly sponsored plans and target benefit plans and PRPPs
- Due diligence and corporate transactions and transitioning from DB to DC
- Pension reform across Canada

Register today at: osgoodepd.ca/pensionlaw
Pension law is complex, technical and, for the unwary, a minefield of potential liability. The list of ‘must-know’ topics seems endless. If you are a professional working in the pensions field, it is critical that you have a current understanding of the key issues and their practical implications.

The Osgoode Certificate in Pension Law, now in its ninth year, will equip you with the practical knowledge and skills you need in your day-to-day work, along with providing valuable networking opportunities.

Developed and taught by acknowledged experts in their fields, representing diverse perspectives, you will complete this program with the information, insights, tactics and the confidence you need to navigate the challenges in this high stakes area.

Whether you are a lawyer, pension professional, CFO, HR Director or Manager, consultant or executive serving on a pension committee, this intensive program is a rare opportunity to master both the big picture of pension regulation, and its applications to the situations you encounter daily.

Pensions issues are becoming increasingly more complex. Mistakes can be critical – and costly. Get what you need to get the job done right.
Drawing on the expertise and experience of leading professionals drawn from management, union and government, including:

**Program Directors**

- **Mark Newton**
  Newton HR Law
- **Jeffrey Sommers**
  Blake, Cassels & Graydon LLP

**Program Faculty**

- **Randy Bauslaugh**
  McCarthy Tétrault LLP
- **Susan Bird**
  CEBs, Fellow ISCEBS, ICD.D, Chair, World Pension Alliance & President, The McAttee Group of Companies
- **Andrea Doctor**
  Stikeman Elliott LLP
- **Jessica Bullock**
  Davies Ward Phillips & Vineberg LLP
- **Natalie Bussière**
  Blake Cassels & Graydon LLP
- **Charley Butler**
  Managing Director, Member Experience and Innovation, Ontario Teachers’ Pension Plan
- **Karen DeBortoli, B.A., LL.B.**
  Director, Knowledge Research Centre, Buck
- **Level Chan**
  Stewart Mckelvey
- **John D.R. Craig**
  Fasken Martineau DuMoulin LLP
- **Scott Cushing**
  Principal, Mercer
- **Mark Firman**
  Director and Legal Counsel, Ontario Teachers’ Pension Plan
- **Clio Godkewitsch**
  Goldblatt Partners LLP
- **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

**Advisory Board**

- **Hrvoje Lakota, FSA, CFA, FCIA**
  Principal, Mercer Global Investments Canada Limited
- **Mariana MacIntosh**
  Director & Associate General Counsel, Pension Administration, Ontario Teachers’ Pension Plan
- **Sean Maxwell**
  Blake, Cassels & Graydon LLP
- **Christopher Mayer**
  Legal Counsel, Healthcare of Ontario Pension Plan (HOOPP)
- **Tejash (TJ) Modi, B.A., J.D., M.B.A.**
  Principal & Chair, Governance, Legal and Compliance Consulting Practice, Morneau Shepell Ltd.
- **Susan Nickerson**
  Torsys LLP
- **Kim Ozubko**
  Miller Thomson LLP
- **John Prezioso**
  Brown Mills Klinck Prezioso LLP
- **Douglas Rienzo**
  Osler, Hoskin & Harcourt LLP
- **Idan Shlesinger**
  Executive Vice President and President, Retirement Solutions, Morneau Shepell Ltd.
- **Susan G. Seller**
  Bennett Jones LLP
- **Scott Sweatman**
  Dentons Canada LLP
- **Susan Ursel**
  Urser Phillips Fellows Hopkins LLP
- **Barry E. Wadsworth**
  Associate Counsel, Unilor
- **Deron P. Waldock**
  McCarthy Tétrault LLP
- **Michael Wolpert**
  Lawson Lundell LLP
Agenda

MODULE 1
February 13, 2019
9:00 a.m. – 4:00 p.m. EST
The Retirement Savings System

Overview of the Canadian Retirement System

Different Types of 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

Who Regulates What? Income Tax Act; Pension Standards Legislation

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

Defined Contribution Plans: The CAP Guidelines and CAPSA DC Plans Guidelines

Faculty
Stephanie J. Kalinowski
Hicks Morley Hamilton Stewart Storie LLP
Mark Newton
Newton HR Law
Idan Shlesinger
Executive Vice President Morneau Shepell Ltd., and President, Retirement Solutions.
Jeff Sommers
Blake, Cassels & Graydon LLP
Scott Sweatman
Dentons Canada LLP
Deron P. Waldock
McCarthy Tétrault LLP

MODULE 2
February 20, 2019
9:00 a.m. – 4:15 p.m. EST
Pensions and the Employment Relationship

Pensions in the Non-Union Workforce
- Common-law and statutory regulation of the employment relationship
- Basic principles of the employment relationship
- Pensions as a part of total compensation
- Changing terms of employment
- Termination of the relationship

Labour Law Issues in Pensions: Management and Union Perspectives
- Pensions in collective bargaining
- The employer-union-employee relationship
- Incorporation of pension plans into a collective agreement
- Jurisdictional issues: arbitrator, pension regulator, courts

Privacy and Human Rights Considerations

Keynote Address: Role of Mediation and Arbitration in Resolving Pension Disputes
Ari N. Kaplan, Kaplan Law

Faculty
John D.R. Craig
Fasken Martineau DuMoulin LLP
Clio Godkewitsch
Goldblatt Partners LLP
Ari N. Kaplan
Kaplan Law
Sean Maxwell
Blake, Cassels & Graydon LLP
John Prezioso
Brown Mills Klink Prezioso LLP
Barry E. Wadsworth
Associate Counsel, Unifor

MODULE 3
February 27, 2019
9:00 a.m. – 4:15 p.m. EST
Assets and Liabilities: Pension Plan Funding and Investment

Funding Requirements Under 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 statement

Regulatory Requirements and Reform of Pension Fund Investment Regulations

Pension Investment Topics: Investment Principles/Liability Studies, Investment Strategies

Ontario Teachers’ Pension Plan: Administration and Structure

Faculty
Randy Bauslaugh
McCarthy Tétrault LLP
Charley Butler
Managing Director, Member Experience and Innovation, Ontario Teachers’ Pension Plan
Scott Cushing
Principal, Mercer
Elana Hagi, FSA, FCIA
Principal, Mercer
Hrvoje Lakota, FSA, CFA, FCIA
Principal, Mercer Global Investments Canada Limited
Jeffrey Sommers
Blake, Cassels & Graydon LLP
# MODULE 4
March 6, 2019  
9:00 a.m. – 4:15 p.m. EST  
Pensions in Corporate Transactions and Restructuring

**Structure and Purpose of a Deal**  
- Share and asset transactions

**Due Diligence and Corporate Transactions and Transitioning from DB to DC**  
- Division or merger of pension plans (DB/DC)  
- Plan documents  
- Actuarial reports  
- Accounting reports, financial statements  
- Representations, warranties, covenants and indemnities

**Pension Issues in Insolvencies and Restructurings**  
**Insolvency and Restructuring Primer**  
- The different insolvency or restructuring mechanisms and how they impact on pension plans: restructuring, financing, receivership, bankruptcy

- The Companies’ Creditors Arrangement Act and the Bankruptcy and Insolvency Act  
- The Pension Benefits Guarantee Fund

**Keynote Address:**  
Governance of Unionized MEPPs  
Susan Bird, CEBS, Fellow ISCEBS, ICD.D  
Chair, World Pension Alliance & President, The McAteer Group of Companies

**Faculty**  
Andrea Boctor  
Stikeman Elliott LLP  
Jessica Bullock  
Davies Ward Phillips & Vineberg LLP  
Terra Klinck  
Brown Mills Klinck Prezioso LLP  
Susan Nickerson  
Torys LLP  
Douglas Rienzo  
Osler, Hoskin & Harcourt LLP

---

# MODULE 5
March 20, 2019  
9:00 a.m. – 4:15 p.m. EDT  
Pension Governance and Risk Management

**Pension Plan Governance and Managing Board Risk**  
- Basic principles  
- Statutory framework  
- Common-law principles  
- Types of risk  
- Governance models: Single-employer, multi-employer, jointly sponsored target benefit plans, and PRPPs

**Governance Polices (Funding, Investment, Record Keeping, Member Inquiries)**

**Pension Governance and Risk Management:**  
Single-Employer, Multi-Employer, Jointly Sponsored Target Benefit Plans, and PRPPs

**Special Considerations for DB and DC Plans**

**Faculty**  
Mark Firman  
Director and Legal Counsel, Ontario Teachers’ Pension Plan  
Mariana MacIntosh  
Director & Associate General Counsel, Pension Administration, Ontario Teachers’ Pension Plan  
Christopher Mayer  
Legal Counsel, Healthcare of Ontario Pension Plan (HOOPP)  
Tejash (TJ) Modi, B.A., J.D., M.B.A.  
Principal & Chair, Governance, Legal and Compliance Consulting Practice, Morneau Shepell Ltd.  
Kim Ozubko  
Miller Thomson LLP  
Susan G. Seller  
Bennett Jones LLP

---

# MODULE 6
March 27, 2019  
9:00 a.m. – 4:30 p.m. EDT  
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.

**Overview of B.C. and Alberta Pension Law Reform**

**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**

**The Evolution of Pension Law in Practice and the the Role of the Financial Services Commission of Ontario**

**Ontario Pension Law Reform**  
- jointly-sponsored pension plans and Ontario public sector pensions  
**Pension Law Reform in Atlantic Canada**

**Keynote Speaker from The Financial Services Regulatory Authority of Ontario (FSRA)**

**Faculty**  
Natalie Bussière  
Blake Cassels & Graydon LLP  
Level Chan  
Stewart McKelvey  
Karen DeBortoli, B.A., LL.B.  
Director, Knowledge Research Centre, Buck  
David Gordon  
Manager, Public Affairs, CAAT Pension Plan  
Michael Wolpert  
Lawson Lundell LLP
Registration Details

Fee per Delegate
$3,795 plus HST

Fees include attendance, program materials, lunch and break refreshments. Visit www.osgoodepd.ca/financial-assistance for details about financial assistance.

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

Cancellations and Substitutions
Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 21 days prior to the program date. If a cancellation request is made with less than 21 days notice, a $150 administration fee will apply. No other refund is available.

For Further Program-Related Information please contact:
Alison Hurst, Program Lawyer at 647.241.2537
or email ahurst@osgoode.yorku.ca

Certificate of Program Completion

You will receive a certificate upon completion of The Osgoode Certificate in Pension Law. To be eligible for the certificate participants must attend all program modules (either in person, via webcast or OnDemand) and pass the post-program multiple choice assessment.

4 Convenient Ways to Register

Register today at:
osgoodepd.ca/pensionlaw

Law Society of Ontario accredited

OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSO.

Eligible CPD Hours – LSO (ON): 38h 15m CPD (34h 15m Substantive; 4h Professionalism)

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

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

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

Patricia Pacanchique, Director, Pension Policy, OMERS

© Osgoode Professional Development, 2018