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

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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 10th 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.

Designed for both the pension professional without legal training and lawyers whose practice includes pension issues, 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.

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Pensions issues are becoming increasingly more complex. Mistakes can be critical – and costly. Get what you need to get the job done right.
Who Should Attend?

- Pension professionals including plan administrators and managers
- Pension lawyers in private practice
- In-house counsel
- HR professionals who work with pensions
- Provincial and federal pension regulators

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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
Drawing on the expertise and experience of leading professionals from management, union and government, including:

**Program Directors**

- **Kim Ozubko**
  Miller Thomson LLP

- **Jeffrey Sommers**
  Blake, Cassels & Graydon LLP

**Program Faculty**

- **Randy Bauslaugh**
  McCarthy Tétrault LLP

- **Susan Bird**
  CEBS, Fellow ISCEBS, ICD.D, Past Chair, World Pension Alliance & President, The McAteer Group of Companies

- **Andrea Boctor**
  Stikeman Elliott LLP

- **Elizabeth Boyd**
  Blake, Cassels & Graydon LLP

- **Taylor Buckley**
  Dentons Canada LLP

- **Jessica Bullock**
  Davies Ward Phillips & Vineberg LLP

- **Natalie Bussière**
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- **Level Chan**
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- **John D.R. Craig**
  Fasken Martineau DuMoulin LLP

- **Scott Cushing**
  Principal, Mercer

- **Karen DeBortoli, B.A., LL.B.**
  Director, Knowledge Research Centre, Buck

- **James Fera**
  Manager Legal Affairs, CAAT Pension Plan

- **Mark Firman**
  Davies Ward Phillips & Vineberg LLP

- **Clio Godkewitsch**
  Goldblatt Partners LLP

- **Elana Hagi, FSA, FCIA**
  Principal, Mercer

- **Reesha Hosein**
  Counsel, Financial Services Regulatory Authority of Ontario

- **Stephanie J. Kalinowski**
  Hicks Morley Hamilton Stewart Storie LLP

- **Terra Klinck**
  Brown Mills Klinck Prezioso LLP

- **Hrvoje Lakota, VP, Portfolio Construction**
  Investment Management Corporation of Ontario

- **Mariana MacIntosh**
  Director & Associate General Counsel, Pension Administration, Ontario Teachers’ Pension Plan

- **Jonathan Marin**
  Osler, Hoskin & Harcourt LLP

- **Sean Maxwell**
  Blake, Cassels & Graydon LLP

- **Tejash (TJ) Modi, B.A., J.D., M.B.A.**
  Principal & Chair, Governance, Legal and Compliance Consulting Practice, Morneau Shepell Ltd.

- **Susan Nickerson**
  Torys LLP

- **John Prezioso**
  Brown Mills Klinck Prezioso LLP

- **Michelle Rival**
  Senior Consulting Lawyer, Willis Towers Watson

- **Susan G. Seller**
  Bennett Jones LLP

- **John M. Solursh**
  Partner Emeritus, Blake, Cassels & Graydon LLP

- **Scott Sweatman**
  Dentons Canada LLP

- **Deron P. Waldock**
  McCarthy Tétrault LLP

- **Michael Wolpert**
  Fasken Martineau DuMoulin LLP (Calgary)

- **Karen DeBortoli, B.A., LL.B.**
  Director, Knowledge Research Centre, Buck

Now in its 10th year, join hundreds of other certificate graduates who use their training daily.

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## Agenda

### MODULE 1
**February 5, 2020**
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

Anatomy of a Pension Plan

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

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### MODULE 2
**February 12, 2020**
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: Governance of Unionized MEPPs
Susan Bird, CEBS, Fellow ISCEBS, ICD.D
Chair, World Pension Alliance & President, The McAteer Group of Companies

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### MODULE 3
**February 19, 2020**
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

Keynote Address: Randy Bauslaugh, McCarthy Tétrault

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### Faculty

**Elizabeth Boyd**
Blake, Cassels & Graydon LLP

**Stephanie J. Kalinowski**
Hicks Morley Hamilton Stewart Storie LLP

**Kim Ozubko**
Miller Thomson

**Michelle Rival**
Senior Consulting Lawyer, Willis Towers Watson

**Jeff Sommers**
Blake, Cassels & Graydon LLP

**Deron P. Waldock**
McCarthy Tétrault LLP

**Michael Wolpert**
Fasken Martineau DuMoulin LLP (Calgary)

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**Mark Zigler**
Koskie Minsky LLP

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Principal, Mercer

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Investment Management Corporation of Ontario

**Jeffrey Sommers**
Blake, Cassels & Graydon LLP

**Anna Zalewski**
Director & Senior Legal Counsel, OTPP

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### MODULE 4
#### February 26, 2020
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

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

### MODULE 5
#### March 4, 2020
9:00 a.m. – 4:00 p.m. EST
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 Policies (Funding, Investment, Record Keeping, Member Inquiries)**

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

**Keynote Address: The Evolution of Pension Law In Practice and the Role of the Financial Services Tribunal (Ontario)**

**John M Solrush**
Partner Emeritus, Blake, Cassels & Graydon LLP

**Faculty**
- Mark Firman
  Davies Ward Phillips & Vineberg LLP
- Mariana MacIntosh
  Director & Associate General Counsel, Pension Administration, Ontario Teachers’ Pension Plan
- 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 11, 2020
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**

**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**

**CATT and Ontario Pension Law Reform**
- jointly-sponsored pension plans and Ontario public sector pensions

**Pension Law Reform in Atlantic Canada**

**Keynote Address: The New FSRA and What It Means for You**

**Reesha Hosein**
Counsel, Financial Services Regulatory Authority of Ontario

**Faculty**
- Taylor Buckley
  Dentons Canada LLP
- Natalie Bussière
  Blake Cassels & Graydon LLP
- Level Chan
  Stewart McKelvey
- Karen DeBortoli, B.A., LL.B.
  Director, Knowledge Research Centre, Buck
- James Fera
  Manager Legal Affairs, CAAT Pension Plan
- Scott Sweatman
  Dentons Canada LLP
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Fee per Delegate: $3,995 + HST
Government Rate: $3,495 + HST

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Alison Hurst, Program Lawyer at 647.241.2537 or email ahurst@osgoode.yorku.ca

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