Essential Tasks of Pension and Benefit Plan Trustees

Chaired by
Murray Campbell
Lawson Lundell LLP

February 24th, 2016 • UBC Robson Square • 800 Robson Street • Vancouver, BC

Live Webinar also available!
--- 22ND ANNUAL ---

**ESSENTIAL TASKS OF PENSION AND BENEFIT PLAN TRUSTEES**

As a trustee, it is essential that you understand your legal duties, what to watch out for, and how to limit your exposure to liability.

To this end, this conference assembles leading experts to educate you on your legal duties as a trustee and how to protect yourself, to update you on recent changes in the law, and to provide you with best practices and practical advice to assist you in creating successful and sustainable plans.

Whether you are newly appointed or a more experienced trustee, this conference is designed to equip you with the tools required to successfully fulfill your duties and to assist in creating and maintaining successful and sustainable plans.

**YOU WILL LEARN:**

- The keys to being an effective pension and benefit plan trustee
- Your responsibilities as a trustee and how to protect yourself from liability
- About recent legal developments, including the implementation of new pension standards legislation in BC and related policy developments
- Key considerations for determining whether to turn your plan into a Target Benefit Plan
- What “Big Data” is and why it is beneficial for benefit plans
- The Regulator’s perspective on the new BC legislation, with insight from the Superintendent of Pensions

**THIS CONFERENCE IS DESIGNED FOR:**

- Pension and benefit plan trustees
- Pension consultants, investment professionals, lawyers and other advisors
- Actuaries
- Insurance professionals

---
ESSENTIAL TASKS OF PENSION AND BENEFIT PLAN TRUSTEES

FEBRUARY 24TH, 2016

9:00  Welcome and Introduction
Murray Campbell
Lawson Lundell LLP

9:10  The Keys to Being an Effective Pension and Benefit Plan Trustee: Trustee Responsibilities and Trustee Protection
John Smith
Lawson Lundell LLP
• What is a trust?
• Trust law as it applies to pension and benefit plans
• What are the core duties of a trustee?
• Liability for other trustees’ actions
• Use of professional advisors
• Indemnity clauses and insurance
• Advice and direction

10:00 Questions and Discussion

10:20 Refreshment Adjournment

10:30 Recent Legal Developments
Murray Campbell
Lawson Lundell LLP
• Latest pension and benefits case law
• Federal and provincial statutory developments

11:00 Questions and Discussion

11:30 The New Pension Legislation in British Columbia – Finally!
Shelley Engman
AON Hewitt Canada
• Review of the new British Columbia Pension Benefits Standards Act and Regulation
• Key legislative changes and their implications
• New policy requirements

12:15 Questions and Discussion

12:25 Networking Lunch

1:30 Should You Turn Your Plan Into a Target Benefit Plan?
Greg Heise
George & Bell Consulting
• What is a TBP?
• The rationale behind TBPs
• Risk sharing and management
• Opportunities and pitfalls

2:15 Questions and Discussion

2:25 Refreshment Adjournment

2:40 The Benefits of Data
Allen Furlong
Morneau Shepell
• What is Big Data?
• Trends in Big Data and data analytics
• Why traditional qualitative and quantitative methods are not keeping up
• Advantages and limitations of Big Data
• Practical applications of the Big Data concept

3:25 Questions and Discussion

3:35 The New BC Legislation: The Regulator’s Perspective
Michael J. Peters
Financial Institutions Commission
• Key insight from the Superintendent of Pensions

4:20 Questions and Discussion

4:30 Networking Reception Sponsored by Lawson Lundell LLP
Four Ways to Register:
1. Telephone us: 604-730-2500 or toll free: 1-877-730-2555
2. Fax us: 604-730-5085 or toll free: 1-866-730-5085
3. Mail your registration form with payment
4. Register at www.pbli.com/1222

Registration: The registration fee is $770.00 plus GST of $38.50 totalling $808.50 covering your attendance at the program (in person or by live webinar), written materials, a light breakfast, a networking lunch and refreshments throughout the day.

Early Bird Discount: Register by January 25th, 2016 and receive a $100 discount on registration fee ($670.00 plus GST).

Group Discount: Register four persons from the same organization at the same time and you are entitled to a complimentary fifth registration. Early Bird and Group Discount cannot be combined.

Payment: You may pay by VISA, MasterCard or cheque. Cheques should be made payable to the Pacific Business & Law Institute. Registration fees must be paid prior to the program.

When and Where: Check-in begins at 8:30 a.m. The program starts at 9:00 a.m. UBC Robson Square is located at the basement level of 800 Robson Street in Vancouver, BC. Please visit http://robsonsquare.ubc.ca/find-us/ for directions.

Materials: The faculty will prepare papers and/or other materials explaining many of the points raised during this program. Materials will be available for pick up at the program. Please contact us at registrations@pbli.com if you are unable to attend the program and wish to purchase a set of materials.

Your Privacy: We will keep all information that you provide to us in strict confidence, other than to prepare a delegate list containing your name, title, firm and city for our faculty and the program delegates. We do not share our mailing lists with any non-affiliated organization.

Cancellations: Full refunds will be given for cancellations (less a $60.00 administration fee) if notice is received in writing five full business days prior to the program (February 17th, 2016). After that time we are unable to refund registration fees. Substitutions will be permitted. We reserve the right to cancel, change or revise the date, faculty, content, availability of webinar or venue for this event.

Course Accreditation: Attendance at this course can be listed for up to 6 hours of continuing professional development with the Law Societies of BC and Upper Canada.

Registration Form
Pacific Business & Law Institute
305 – 1681 Chestnut Street
Vancouver, BC Canada V6J 4M6
Telephone: 604-730-2500; Fax: 604-730-5085
E-mail: registrations@pbli.com

Information

Registration:
1. Telephone us: 604-730-2500 or toll free: 1-877-730-2555
2. Fax us: 604-730-5085 or toll free: 1-866-730-5085
3. Mail your registration form with payment
4. Register at www.pbli.com/1222

Registration fee: The registration fee is $770.00 plus GST of $38.50 totalling $808.50 covering your attendance at the program (in person or by live webinar), written materials, a light breakfast, a networking lunch and refreshments throughout the day.

Early Bird Discount: Register by January 25th, 2016 and receive a $100 discount on registration fee ($670.00 plus GST).

Registration:

How did you hear about this Program?

- Brochure
- Email
- Colleague
- PBLI Website
- Other

Register today at www.pbli.com/1222