

Pensions Without Borders

Date: Thursday, February 7, 2013 | 9:00 am to 12:20 pm

Location: Westin Harbour Castle Conference Centre, 2 Harbour Square

Program Chairs: **Shemin Manji**, Financial Services Commission of Ontario - North York
John Prezioso, Hicks Morley Hamilton Stewart Storie LLP



3.25 Substantive Hours
0 Professionalism Hours

Note: New members may apply any program that contains a minimum of **0.5 Professionalism Hours** toward the annual CPD requirement.

Although the Ontario and federal governments passed their first major pension reform legislation over 20 years ago, in 2010, the coming into force of many reforms awaited government proclamation of the issuance of detailed regulations. A wave of significant Ontario reforms took effect in 2012, including reforms relating to the valuation and division of pension assets on marriage breakdown and expanded grow-in rights on termination of employment, with more to come in 2013. At the same time, the pension and benefits area continues to be fertile ground for litigation before courts, tribunals and arbitrators. This program will examine the pension industry's experience with reforms to date, consider recent key pension and benefits cases, and anticipate emerging issues for 2013 and beyond

9:00 am **Opening Remarks**

9:05 am **Implementation of Ontario Pension Reform: Emerging Issues**

Speakers will discuss emerging issues relating to the implementation of select aspects of Ontario pension reform to date, including the expanded grow-in provisions of the PBA and new rules respecting the distribution of surplus.

Elizabeth Boyd, Blake, Cassels & Graydon LLP
Michael Mazzuca, Koskie Minsky LLP

9:45 am **Going Dutch: A panacea for Canada's DB pension woes?**

Panelists will consider New Brunswick's adoption of the "shared-risk" pension plan model based on the Dutch model, will discuss whether the New Brunswick model can yield sustainable defined benefit pension plans in Canada, and will consider challenges to bringing the shared-risk model to Ontario.

Paul Lai Fatt, Morneau Shepell Ltd
Angela Mazerolle Stephens, Superintendent of Pensions at Government of New Brunswick - Fredericton, NB
Jana Steele, Goodmans LLP

10:30 am **Break**

10:50 am **2012 Case Law Roundup**

Speakers will discuss 5 key cases you need to know about (and why)

Hugh O'Reilly, Cavalluzzo, Shilton, McIntyre Cornish LLP
Douglas Rienzo, Osler Hoskin & Harcourt LLP

11:30 am **Made in Canada, Global Footprint**

Panelists will discuss how Canadian pension plans are leading the way with international infrastructure initiatives.

Graham Pugh, VP, Investment Risk, OMERS
Michael Kelly, Borealis Infrastructure
Gregory Winfield, McCarthy Tétrault LLP

12:10 pm **Closing Remarks**

12:20 pm **Program Concludes**

Your registration fee includes the keynote address, welcome reception, special events, breakfasts, lunches, refreshments, and access to the electronic materials for ALL programs.

PROGRAM REGISTRATION IS ONLINE www.oba.org/institute2013

Questions? pd@oba.org