

58TH ANNUAL CANADIAN EMPLOYEE BENEFITS CONFERENCE

November 23-26, 2025

Vancouver Convention Centre
Vancouver, British Columbia

Preconferences: November 21-23



Il y en a pour tous les
goûts à la **58^e conférence
annuelle canadienne sur
les avantages sociaux!**

CONFERENCE OVERVIEW

www.ifebp.org/canannual

International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA

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Since 1968, the Annual Canadian Employee Benefits Conference has been developed in collaboration with Canadian pension and benefits leaders to provide the in-depth education needed to effectively manage benefit and pension plans while serving the interests of Canadian plan practitioners.

Join us in Vancouver for unbiased, objective information about upcoming trends, legislative changes and key topics impacting your funds. You'll gain actionable takeaways to improve your organization and the funds you serve. Now more than ever, it is crucial your plans are prepared for whatever lies ahead.



Benefits of Attending

- Fulfill your fiduciary duty by staying up to date on the latest regulatory and legislative changes.
- Learn new approaches from leading industry experts.
- Receive unbiased education to help secure long-term sustainability for your fund.
- Uncover ideas to ensure your fund is maximizing its potential.
- Find out how other funds are tackling issues similar to your own, and discuss what worked and what didn't.
- Hear about emerging trends and what they could mean for your plans.
- Network with your colleagues and peers.

58^E CONFÉRENCE ANNUELLE CANADIENNE SUR LES AVANTAGES SOCIAUX

23 au 26 novembre 2025

Centre des congrès de Vancouver | Vancouver, Colombie-Britannique

Vous recherchez du contenu en français? Un volet complet avec 14 sessions vous est proposé, couvrant les sujets sur la santé, les placements, les tendances en matière de retraite et bien plus. Découvrez les outils, idées et stratégies les plus récents pour vous aider à prendre des décisions éclairées au bénéfice des participants à votre régime. Assistez à des conférences données par des experts de l'industrie, échangez avec des professionnels des avantages sociaux et discutez des meilleures pratiques dans un environnement en constante évolution.

Après avoir assisté à trois journées de contenu de haut niveau, vous repartirez avec une perspective renouvelée, des idées concrètes et une solide préparation pour l'avenir.

Nouveauté cette année : nous ajoutons le cours **Principes fondamentaux de gestion des fiducies** en préconférence les 21 et 22 novembre. Rendez-vous à la page 10 pour tous les détails.

À qui s'adresse cette conférence?

Cette conférence s'adresse à un large éventail de professionnels du secteur des avantages sociaux et de la gestion de fonds, notamment :

- Conseillers en avantages sociaux
- Avocats, comptables, actuaires, gestionnaires de placements, consultants et autres experts-conseils
- Fiduciaires et administrateurs de régimes interentreprises
- Gestionnaires d'entreprise et dirigeants d'associations
- Fiduciaires de régimes du secteur public, directeurs exécutifs et membres du personnel
- Administrateurs et gestionnaires de fonds
- Fournisseurs de services d'administration (tiers administrateurs)
- Et tout autre professionnel impliqué dans la gouvernance, l'administration ou l'optimisation des régimes de retraite et d'avantages sociaux.

Pourquoi participer :

- Acquérir une compréhension approfondie des enjeux actuels touchant les régimes de santé et de retraite.
- Explorer de nouvelles approches et des solutions novatrices susceptibles de générer des économies ou d'offrir des avantages accrus aux participants.
- Identifier des idées pour maximiser le potentiel de votre fonds.
- Apprendre comment d'autres régimes font face à des défis similaires et partager les succès comme les échecs.
- Suivre les tendances émergentes et comprendre leur incidence potentielle sur vos régimes.



Visiter fr.ifebp.ca/annuelle avant le 14 octobre pour vous inscrire et économiser 300 \$CAD.

Keynote Speakers



**The Honourable
Chantal Petitclerc, CC, CQ, MSM**
*Senator
Paralympic Champion
Montréal, Québec*



Pamela Barnum, J.D., M.P.A.
*Former Undercover Police Officer and
Federal Prosecuting Attorney
Calgary, Alberta*

Sunday Opening Keynote

The Inclusion Revolution: When We Choose to Include, We All Win

November 23 | 4:45-6:30 p.m.

Together, we thrive when we embrace the power of inclusion. Drawing from my own experiences, I illustrate how each of us—whether as individuals or as part of an organization—can actively choose to foster a culture of inclusion.

Monday Morning Keynote

TRUST Starts With You—A Blueprint for Excellence

November 24 | 8:00-9:15 a.m.

Trust is in crisis, and earning trust has never been more imperative than it is now. Trust reduces risk, improves culture and increases innovation to prepare for an uncertain future. Master the five qualities that set trusted leaders apart from the rest:

Transparent communication—Learn how to establish stability and security in times of uncertainty without overcommunicating or micromanaging.

Respect for self and others—Discover how best to use emotional intelligence in life's most challenging moments.

Unimpeachable decisiveness—People do not trust the indecisive or constant change in direction. Learn proven strategies to take you and your team from chaos to cohesion.

Self-confident communication cues that increase rapport and decrease conflict anywhere, anytime.

Tact and compassion—Why these traits are scientifically proven to inspire your people to take risks and push beyond their self-imposed limits.



La **traduction** simultanée de certaines sessions sera offerte.

Keynote Speakers



Tamara Levitt

*Head of Mindfulness for the Calm App
Narrator of The Daily Calm
Toronto, Ontario*

Tuesday Morning Keynote

Mindfulness for Trustees

November 25 | 8:00-9:00 a.m.

Join us for this unique fireside chat! The head of mindfulness for the Calm app and the narrator of The Daily Calm, Tamara Levitt, will be interviewed by her high school friend, Ari Kaplan, a pension lawyer, MTMS instructor and author of *The Toronto Method Mindfulness Handbook*. Learn how mindfulness can improve your life and how and why it is an important tool for trustees to more effectively navigate an increasingly complex world.



Alik Lafontaine, M.D., FRCPC

*First Indigenous Physician and the
Youngest Doctor to Lead the
Canadian Medical Association (CMA)
Grande Prairie, Alberta*

Wednesday Closing Keynote

What Brought You Here Won't Take You There

November 26 | 10:30-11:30 a.m.

Growing up, Dr. Alik Lafontaine was told by school officials that he would never amount to much of anything due to his diagnosis of developmental delay with speech impediment and difficulty reading. Today, he is an award-winning physician, a social innovator and the first Indigenous physician to lead the Canadian Medical Association—the voice of Canada's 92,000+ physicians—in its 156-year history. Through deeply vulnerable storytelling, Lafontaine illustrates how early challenges can drive us to do amazing things. Through linking his childhood experiences to his success as a national leader, he shows audiences why we must let go of the past to thrive in a changed world and become what the present needs us to be.

Not a member?

Join to gain exclusive benefits and save C\$330 on your registration.



Featured Sessions



Yanick Desnoyers

*Chief Economic Strategist
Addenda Capital
Montréal, Québec*

Monday Morning Plenary 1*

Economic Outlook 2026

November 24 | 9:30-10:30 a.m.

The U.S. administration imposed tariffs on their trading partners to bring manufacturing production back to the U.S. Looking back at 2025 and discussing the most likely economic scenario for 2026, this presentation will answer the following questions:

- What was the impact on U.S. growth and inflation?
- Given the current state of the economy, what can we expect for 2026 in terms of growth, inflation and monetary policy from the Federal Reserve?
- What have been the impacts of tariffs on the Canadian economy so far?
- What should we expect in terms of monetary policy and the likely direction of the currency?

Monday Morning Plenary 2*

Legal/Legislative Developments Across Canada

November 24 | 10:45-11:45 a.m.

This panel will discuss proposed and recently passed legislation and regulations as well as court decisions affecting pension and health and welfare plans.

Follow-Up Afternoon Sessions

Regional updates will be presented in the afternoon on November 24.



Lisa C. Chamzuk

*Partner
Lawson Lundell LLP
Vancouver, British Columbia*



Hugh Wright

*Partner
Miller Thomson LLP
Halifax, Nova Scotia*



Mark Zigler

*Senior Partner
Koskie Minsky LLP
Toronto, Ontario*

* Ces sessions seront offertes en français.

Featured Sessions



Tuesday Morning Plenary 1

Beyond Savings: Crafting a Sustainable Retirement Income Experience

November 25 | 9:15-10:30 a.m.

Join us for an enlightening panel session that shifts the focus from accumulating savings to effectively navigating the decumulation phase—transforming a lifetime of savings into a reliable monthly income stream that can endure for over 30 years. This research-backed discussion will provide attendees with a comprehensive understanding of the retirement journey, equipping them with actionable insights to enhance retirement outcomes.



Janice Holman,
CFA, CFP

*Principal, Financial Wellness
and DC Consulting
Eckler Ltd.
Halifax, Nova Scotia*



Bonnie-Jeanne MacDonald,
Ph.D., FCIA, FSA

*Director of Financial
Security Research
National Institute on Ageing,
Toronto Metropolitan University
Halifax, Nova Scotia*



Jessica Sclafani, CAIA

*Global Retirement
Strategist
T. Rowe Price, Inc.
Boston, Massachusetts*



Ian Lee, Ph.D.

*Associate Professor, Management
Sprott School of Business
Carleton University
Ottawa, Ontario*

Tuesday Morning Plenary 2

Trump, Tariffs and Canada

November 25 | 10:45-11:45 a.m.

Is this the end of North American integration, or are we renewing our marriage vows? Using empirical trend graphs from Stats Canada, Global Affairs Canada and various U.S. government agencies, this featured session will review the trading relationship—including tariffs—between Canada and the U.S. up to November 2025. An evaluation of the longer term outlook for the U.S.–Canada relationship will also be included.

Preconference Workshops

SPEAKERS



Roland Chiwetelu, CFP

*Associate Director,
Financial Wellness
Eckler Ltd.
Toronto, Ontario*



Kyra Jones, Ph.D.

*Chief Design Officer
Adapt with Intent Inc.
Kitchener, Ontario*

As lifespans lengthen, we have more healthy years to enjoy, requiring plan members to focus beyond just financial planning. Through an evidence-informed perspective, this two-day workshop will help you understand and prepare for a successful and healthy retirement.

DAY ONE

Health, Wealth and Happiness— Planning Your Path to a Successful Retirement (Part 1)

Saturday, November 22 | 8:00 a.m.-12:00 noon

Plan members no longer need to settle for a one-size-fits-all approach to retiring. Together, we will:

- Shift your mindset from planning for retirement to designing a longevity lifestyle to meet your unique needs
- Challenge and test assumptions to play with the possible ways to find meaning and enjoyment in retirement
- Design a prototype of what retirement could look like for you and how you will spend your time in your next adventure
- Explore the challenges that exist in retirement, such as inflation, longevity and the ever-changing economic landscape
- Identify goals for retirement and how to fund your ideal retirement lifestyle
- Understand the various sources of retirement income, including government, workplace and personal income sources.

Preconference Workshops

SPEAKERS



Tyler Amell, Ph.D., M.Sc., B.Sc.

*Chief Health and Strategy Officer
MediKeeper, Inc.
Adjunct Faculty
Pacific Coast University for
Workplace Health Sciences
Calgary, Alberta*



Roland Chiwetelu, CFP

*Associate Director,
Financial Wellness
Eckler Ltd.
Toronto, Ontario*

DAY TWO

Health, Wealth and Happiness— Living Your Best Retirement (Part 2)

Sunday, November 23 | 8:00 a.m.-12:00 noon

Securing a healthy and successful retirement should not be stressful. This workshop will continue to explore tools and resources to boost and protect your retirement income and focus on achieving a *healthy and productive retirement*. Here, we will:

- Learn about the aging process and what you can do now to better prepare your mind and body for the future you
- Learn what can affect your healthy lifestyle goals and why it's important to be prepared
- Share resources that contribute to wellness and well-being, and identify activities to give your life structure and purpose postretirement
- Learn four strategies to maximize retirement income and make it more secure
- Understand how to optimize tax in retirement.



Really enjoyed this presentation. It was filled with good, detailed information that all those thinking of retirement should hear.

Highly interactive and engaging session. I had not planned my retirement in this way before, and it was an excellent exercise.



Trustee Education Preconference Courses



Foundations of Trust Management Standards

www.ifebp.org/ftms

Friday, November 21 | 8:00 a.m.-4:30 p.m.

Saturday, November 22 | 8:00 a.m.-4:30 p.m.

Designed for the needs of new trustees looking to get up to speed on the basics of trust management, Foundations of Trust Management Standards (FTMS®) will provide the knowledge you need to help ensure your plan's success. FTMS is the first step in the trustee education path, focused on the needs of new Canadian trustees.

Course Objective

The objective of FTMS is to increase **awareness** and **understanding** of the basics in the key knowledge areas of effective management of trusts:

- Legal
- Administration
- Governance
- Funding/investment/finance.



Principes fondamentaux de gestion des fiducies

fr.ifebp.ca/fiducie

Vendredi 21 novembre | 8 h 00 à 16 h 30

Samedi 22 novembre | 8 h 00 à 16 h 30

Objectif du cours :

Principes fondamentaux de gestion des fiducies constitue la première étape du parcours de formation des fiduciaires et est spécifiquement adapté aux fiduciaires souhaitant acquérir une base solide en gestion de fiducie. Ce cours vise à accroître la compréhension des principes de base dans les domaines clés suivants de la gestion efficace des fiducies :

- Matières juridiques et réglementaires
- Administration
- Gouvernance
- Financement, placements et gestion financière

Trustee Education Preconference Courses



Advanced Trust Management Standards

www.ifebp.org/atms

Friday, November 21 | 8:00 a.m.-4:30 p.m.

Saturday, November 22 | 8:00 a.m.-4:00 p.m.

Designed for the needs of advanced trustees, Advanced Trust Management Standards (ATMS®) has engaging instruction and interactive case studies that will give you the tools you need not only to be successful in your role as a trustee but also to look toward the future and prepare your plan for the challenges ahead. ATMS includes two sequential programs:

ATMS Session A and **ATMS Session B**.

Course Objective

ATMS focuses on the **application** and **analysis** of the key knowledge areas of effective trust management, adding breadth and depth to what is learned in FTMS and strengthening the pension and health and welfare application. Course materials consist of all on-site presentation materials, supplementary readings and additional information for future reference.



Master of Trust Management Standards

www.ifebp.org/mtms

Friday, November 21 | 8:00 a.m.-4:30 p.m.

Saturday, November 22 | 8:00 a.m.-4:00 p.m.

For those who have completed both FTMS and ATMS, Master of Trust Management Standards (MTMS®) is for leaders who are ready to look past the day-to-day operations of their funds and leverage their own unique leadership strengths and skills to optimize their contributions.

Course Objective

The objective of MTMS is to prepare longer term trustees/fiduciaries to contribute to effective board management in a leadership capacity and to fulfill the board's oversight role. The MTMS program is highly interactive, focusing on **evaluation** and **creation** of new points of view as well as behavioural change in the areas of leadership, governance, oversight, strategic planning and risk management.



MTMS Advanced Leadership Summit

www.ifebp.org/mtmssummit

Sunday, November 23 | 8:00 a.m.-12:00 noon

The MTMS Advanced Leadership Summit is a continuing education program for those who have earned an MTMS credential. Each Summit focuses on a topic of particular interest to plan trustees. The topic focus of the MTMS Advanced Leadership Summit will change each year to reflect the most essential issues facing trustees.

This Year's Topic:

How to Build Trust on Your Board

Do you struggle with trust issues on your board? Have you experienced the mistrust of a CEO, consultant and/or another trustee? Do you avoid addressing trust because you don't know how?

Learn how to be intentional and purposeful in building a more trustworthy board. Empower your board to have difficult conversations and develop strategies to address mistrust and approaches to create and regain trust.

This in-depth workshop will provide attendees the opportunity to practice building trust in small groups. Let's assess the impact of lack of trust on pension and benefit boards. Topics include:

- The definition, importance and basis of trust
- The role of board culture—The invisible trustee
- Leading from any seat
- Solutions to address a lack of trust
- The hazards of too much trust and acquiescing to others.



Pamela Barnum, J.D., M.P.A

*Former Undercover
Police Officer and Federal
Prosecuting Attorney
Calgary, Alberta*

Additional Education Opportunity in Canada

Canadian Investment Institute

September 8-10, 2025

Delta Hotels St. John's Conference Centre
St. John's, Newfoundland and Labrador



Register today at www.ifebp.org/canadainvest.

Earn Your Certificate of Attendance

A certificate of attendance will be issued to registrants whose attendance can be verified at 12 or more sessions of the main conference, beginning with the opening keynote session on Sunday. Be sure to have your badge scanned as you exit each session.

Continuing Education

Request continuing education (CE) credit on conference registration forms at least 60 days prior to the beginning of the conference so that the Foundation can seek preapproval from the governing agency. Attendees will receive personalized CE attendance slips. You may also request CE on site at the conference registration desk and obtain blank forms. All CE forms must be completed properly and submitted at the conclusion of each session. CE forms will not be accepted at any other location, and only one (1) will be accepted for each time period. Badge scanning does not qualify for CE credit. Due to the approval process by the Chambre de la sécurité financière, insurance CE credit is not available in Québec. For more information, contact the Continuing Education Department at (833) 886-3749, or email continuinged@ifebp.org.



CEBS Compliance Credit—Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.

Join Us in Vancouver!

Join us in Vancouver, a captivating city where the majesty of the Pacific Ocean meets the grandeur of the coastal mountains. With its vibrant blend of natural beauty and urban sophistication, Vancouver offers an inspiring setting that seamlessly merges outdoor adventure with cosmopolitan culture. Stroll through the iconic Stanley Park, explore the artistic enclaves of Granville Island and indulge in world-class cuisine that reflects the city's rich multicultural heritage.

Rejoignez-nous à Vancouver!

Joignez-vous à nous à Vancouver, une ville fascinante où l'océan Pacifique rencontre la majesté des montagnes côtières. Alliant harmonieusement beauté naturelle et raffinement urbain, Vancouver offre un cadre inspirant propice à l'aventure en plein air et à la découverte culturelle. Promenez-vous dans le parc emblématique Stanley, explorez l'effervescente île Granville et savourez une cuisine de renommée mondiale, reflet du riche patrimoine multiculturel de la ville.



Attestation de participation

Une attestation sera remise aux participants ayant assisté à 12 sessions ou plus, en commençant par la session d'ouverture du dimanche. Assurez-vous de faire scanner votre badge à la sortie de chaque session.

Crédits de formation continue (FC)

Vous pouvez obtenir des crédits de FC en faisant la demande sur votre formulaire d'inscription au moins 60 jours avant le début de la conférence. Des demandes peuvent aussi être faites sur place au comptoir d'inscription. Les formulaires doivent être remplis et remis à la fin de chaque session. Les scannings de badge ne donnent pas droit à des crédits.

Veuillez noter que les crédits ne sont pas offerts au Québec pour les permis régis par la Chambre de la sécurité financière.

Pour toute question : questions@ifebp.ca ou 438 812-3948.



Crédit de conformité CEBS – Les sessions éducatives de cette conférence peuvent être admissibles à un crédit de conformité CEBS autodéclaré. Visitez le site www.cebs.org/compliance pour plus d'informations. Veuillez noter que ces renseignements sont actuellement disponibles en anglais seulement.

Be a part of the country's most respected employee benefits conference!

Show your support for the International Foundation's educational mission and gain valuable recognition for your organization by becoming a sponsor of the Annual Conference. **Work smarter and harness the power of in-person marketing** when you network with **employee benefit influencers and decision makers**.

This is your opportunity to learn about the issues of greatest concern to them, answer their questions and be a resource for solutions. You'll make valuable connections that can grow your business!

Sponsors are recognized before, during and after the conference, on our website, in on-site signage and program materials, on name badges and more. Sponsors may also display a company brochure in our Sponsor Resource Area!

For more information, please contact **Diane Mahler, Manager, Business Development and Industry Engagement**, at dianem@ifebp.org or (262) 373-7656.

JOIN OUR SPONSORS



Participez à la conférence la plus respectée au pays dans le domaine des avantages sociaux.

Rejoignez les entreprises qui nous soutiennent déjà en tant que commanditaires et profitez d'une visibilité exceptionnelle avant, pendant et après l'événement.

Être commanditaire, c'est bien plus qu'une simple présence :

- Positionnez votre organisation comme un leader dans le secteur
- Renforcez vos relations avec des décideurs et influenceurs clés
- Bénéficiez d'occasions de réseautage ciblées et de reconnaissance stratégique

Pour en savoir plus sur les options de commandite, contactez Niech'Elle Skeete, Directrice adjointe, éducation et développement - Québec, à nskeete@ifebp.org ou au 438 812-3948.

Hotel Information

- 1 Fairmont Hotel Vancouver***
 Room Rate: C\$249 single/double occupancy
 C\$299 triple occupancy
 C\$349 quadruple occupancy
- 2 Fairmont Pacific Rim**
 City View: C\$349 single/double occupancy
 C\$399 triple occupancy
 C\$449 quadruple occupancy
 Water View: C\$399 single/double occupancy
 C\$449 triple occupancy
 C\$499 quadruple occupancy
- 3 Fairmont Waterfront**
 City View: C\$249 single/double occupancy
 C\$299 triple occupancy
 C\$349 quadruple occupancy
 Water View: C\$289 single/double occupancy
 C\$339 triple occupancy
 C\$389 quadruple occupancy
- 4 Hyatt Regency Vancouver***
 Room Rate: C\$289 single/double occupancy
 C\$324 triple occupancy
 C\$359 quadruple occupancy
- 5 Pan Pacific Vancouver***
 Room Rate: C\$319 single/double occupancy
 C\$369 triple occupancy
 C\$419 quadruple occupancy
- 6 Pinnacle Hotel Harbourfront***
 City View: C\$245 single/double occupancy
 C\$275 triple occupancy
 C\$405 quadruple occupancy
- 7 Vancouver Marriott Pinnacle**
 City View: C\$299 single/double occupancy
 C\$349 triple occupancy
 C\$399 quadruple occupancy

*Union hotel

- ★ Vancouver Convention Centre**
 All sessions will take place at the Vancouver Convention Centre. All hotels are in walking distance of the Vancouver Convention Centre.



Reservation Deadline:

October 14, 2025 | Please specify your hotel requirements when registering.
Note: Hotel room availability is not guaranteed outside of scheduled program dates. Hotel rates include a C\$10 nightly per room facility charge.

Policies:

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. Visit www.ifebp.org/policies for details.

Hotel Reservation Deadline: October 14, 2025

Not a member?

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58^E CONFÉRENCE ANNUELLE CANADIENNE SUR LES AVANTAGES SOCIAUX

23 au 26 novembre 2025

Centre des congrès de Vancouver

Vancouver, Colombie-Britannique

Préconférences : 21 au 23 novembre 2025

Rejoignez des leaders, experts et décideurs de partout au pays pour cet événement incontournable dans le domaine des avantages sociaux.

Soyez au cœur de la conversation.

- Acquérir une compréhension approfondie des enjeux actuels touchant les régimes de santé et de retraite.
- Explorer de nouvelles approches et des solutions novatrices susceptibles de générer des économies ou d'offrir des avantages accrus aux participants.
- Identifier des idées pour maximiser le potentiel de votre fonds.

fr.ifebp.ca/annuelle

