

EVOLVE

Benefits and Workforce
Strategies Summit

June 24-26, 2025

White Oaks Conference Resort & Spa
Niagara-on-the-Lake, Ontario



Niagara-on-the-Lake, Ontario

Learn.
Connect.
Engage.

EVOLVE.

www.ifebp.org/EVOLVE

International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA

EVOLVE

Benefits and Workforce Strategies Summit

June 24-26, 2025

Niagara-on-the-Lake, Ontario

This dynamic conference created by Canadian pension and benefits experts will cover the latest trends to attract, retain and support your workforce.

Who Should Attend

This conference is perfect for:

- Experienced Canadian HR, pension and benefits professionals who want to know the latest best practices, trends and strategies
- Those new to the industry who want to learn and build their network
- HR leaders who are taking on a new mandate and want to upskill
- Providers (e.g., consultants, administrators, benefit coordinators) looking to better serve their clients.

It's All About Engagement

You'll have plenty of opportunities to share your views, get your questions answered and network with other Canadian professionals, all while getting the insights you need to sustain and grow your organization.

- Welcome reception on Tuesday, June 24! Drop in anytime between 5:00 and 7:00 p.m.
- Panel discussions with industry experts
- Real-life case studies from leading organizations
- "Speed-dating-style" roundtables on topics of interest

Table Sponsorships Available!

Invite your clients and colleagues to be your guests at a discounted rate.

Great Networking Opportunity—Table of six: C\$6,000 (a C\$8,970 value!)

Contact Diane Mahler at dianem@ifebp.org or (262) 373-7656.

PROGRAM AT A GLANCE

| TUESDAY June 24, 2025 | |
|----------------------------------|--|
| 5:00-7:00 p.m. | Welcome Reception |
| WEDNESDAY June 25, 2025 | |
| 8:30-8:45 a.m. | Networking Icebreaker and Opening Remarks |
| 8:45-9:45 a.m. | <i>KEYNOTE</i> : Resilience Through Adversity |
| 9:45-10:30 a.m. | Strategies for Creating and Implementing a Neurodiversity-Friendly HR and Benefits Strategy |
| 10:30-11:00 a.m. | Networking Break |
| 11:00 a.m.-12:00 noon | Revolutionizing Employee Engagement With Hyperpersonalized Benefits |
| 12:00 noon-1:00 p.m. | Lunch (<i>provided</i>) |
| 1:00-1:45 p.m. | AI and Retirement Planning: What Does the Future Hold? |
| 1:45-2:30 p.m. | CAPSA and Other DC Developments: What Plan Sponsors Need to Know |
| 2:30-3:00 p.m. | Networking Break |
| 3:00-4:00 p.m. | “Speed-Dating-Style” Roundtables on Topics of Interest |
| 4:30-6:00 p.m. | Networking Reception |
| THURSDAY June 26, 2025 | |
| 8:30-9:30 a.m. | <i>INTERACTIVE WORKSHOP</i> : Conflict Resolution at Work |
| 9:30-10:15 a.m. | Obesity at Work: Tackling Bias, Reducing Costs and Building a Healthier Workforce |
| 10:15-10:30 a.m. | Networking Break |
| 10:30-11:30 a.m. | Hot Topics in Drug Plan Management Today |
| 11:30 a.m.-12:15 p.m. | Response to Societal Trends: Insights on How Social Justice, Climate Change and DEIB Intersect With Workplace Policies and Practices |

(All times are listed in Eastern Time.)

PROGRAM SCHEDULE

TUESDAY | June 24, 2025

5:00-7:00 p.m.

Welcome Reception

Join us at this networking reception to kick off the conference! Drop in anytime between 5:00 and 7:00 p.m.

The registration/information desk will be open during this time.



WEDNESDAY | June 25, 2025

7:30-8:30 a.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-8:45 a.m.

Networking Icebreaker and Opening Remarks

8:45-9:45 a.m.

KEYNOTE: Resilience Through Adversity

Join Tareq on an emotional journey from Syria to Canada, with heartbreaking and perspective-shaping stops along the way—from sunny days in Syria where the scent of roses filled the air to the beginning of conflict and war. This session is an emotional rollercoaster that will leave you feeling inspired and resolved to make your own impact on the world.

Speaker: **Tareq Hadhad**, Founder and CEO, Peace by Chocolate

**Register online at
www.ifebp.org/EVOLVE.**

WEDNESDAY | June 25, 2025 *(continued)*

9:45-10:30 a.m.

Strategies for Creating and Implementing a Neurodiversity-Friendly HR and Benefits Strategy

Neurodiversity can be a powerful driver of innovation and productivity in your workforce, but what do you need to do to create a supportive environment? This session will explore actionable strategies for embracing neurodiversity in the workplace—from building an inclusive culture to crafting employee wellness programs that support neurodiverse individuals. We'll cover practical steps such as tailored training and communications, workplace adjustments and optimized benefits packages. Join us to learn how supporting neurodiversity isn't just a smart business strategy; it's also very achievable.

Speakers: **Melanie Crutchley, M.Sc., M.B.A.**, Founder and Lead Marketing Consultant, Futurpruf Marketing Inc.
Jenn Welch, Principal, Communication Consulting, Eckler Ltd.

10:30-11:00 a.m.

Networking Break

11:00 a.m.-12:00 noon

Revolutionizing Employee Engagement With Hyperpersonalized Benefits

In today's fast-paced and competitive talent landscape, standard employee benefit programs no longer measure up. Employees are demanding more—benefits that resonate with their individual needs and lifestyles. Enter hyperpersonalized benefits: a revolutionary approach to employee engagement that transforms how companies attract, retain and support their workforce. Learn how innovative approaches, such as personalized wellness programs, pharmacogenetics and dynamic disability solutions, can help organizations elevate employee satisfaction, reduce health care costs and drive workplace productivity.

Speaker: **Taylor Valée, CEBS**, Director, Enterprise Group Solutions, People Corporation

12:00 noon-1:00 p.m.

Lunch *(provided)*

WEDNESDAY | June 25, 2025 *(continued)*

1:00-1:45 p.m.

AI and Retirement Planning: What Does the Future Hold?

The increasing influence of artificial intelligence (AI) on human activity promises profound change for the way we live, work and play. This session examines AI types, how they work, current and future AI in the retirement and investment industry, and how the technology can be harnessed to meet the needs of employers and plan sponsors.

Speaker: **Mark S. Yamada**, President and Chief Executive Officer, PÜR Investing Inc.

1:45-2:30 p.m.

CAPSA and Other DC Developments: What Plan Sponsors Need to Know

With new guidance from CAPSA and emerging decumulation strategies, there's a lot for DC plan sponsors to be aware of. Learn the latest trends and developments as well as actions plan sponsors need to take to keep pace.

Speakers: **Bernadette Chik, CFA**, Leader of Defined Contribution Advisory Business, Wealth, Canada, Mercer
Jonathan J. Marin, Lawyer, Osler, Hoskin & Harcourt LLP

2:30-3:00 p.m.

Networking Break

3:00-4:00 p.m.

"Speed-Dating-Style" Roundtables on Topics of Interest

In this engaging session, you'll pick three topics and rotate tables to discuss them (20 minutes per topic). Bring your thoughts, questions and ideas, and get ready for some insightful dialogue!

4:30-6:00 p.m.

Networking Reception



THURSDAY | June 26, 2025

7:30-8:30 a.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

INTERACTIVE WORKSHOP: Conflict Resolution at Work

“Pat’s always so negative!” Are internal conflicts sapping your team’s energy and productivity? In this practical workshop, you’ll learn the skills and strategies you need to dissolve interpersonal and team conflicts, as well as how leaders can create norms (and values) to support team members in resolving their own conflicts.

Speaker: **M. Cole Cohen, Ph.D.**, President, Coleagues Consulting Corp.

9:30-10:15 a.m.

Obesity at Work: Tackling Bias, Reducing Costs and Building a Healthier Workforce

This session delves into understanding obesity as a chronic disease, examining its multifaceted causes and the necessity for comprehensive treatment approaches. We’ll discuss the significant economic implications of inaction, highlighting how untreated obesity escalates health care costs and diminishes workplace productivity. We’ll also explore effective workplace strategies to support employees living with obesity, fostering an inclusive environment that promotes health and well-being.

Speaker: **Sandra Elia**, Chair, Obesity Matters

10:15-10:30 a.m.

Networking Break

**Register online at
www.ifebp.org/EVOLVE.**

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THURSDAY | June 26, 2025 *(continued)*

10:30-11:30 a.m.

Hot Topics in Drug Plan Management Today

Your drug plan is a key part of your benefits package and can help improve the health and well-being of your workforce, but it also comes with a significant cost. This session will provide an environmental scan and update on hot topics impacting Canadian private drug plans. You'll learn about emerging developments and trends, such as national pharmacare, the federal strategy for drugs for rare diseases, preferred pharmacy networks, obesity drugs, biosimilars, drug pooling and drug pricing.

Speakers: **Suzanne M. Lepage**, Private Health Plan Strategist,
Suzanne Lepage Consulting Inc.

Neda Nasser, Pharm.D., M.B.A., M.Sc., Product Director,
Drug Insurance, Desjardins

11:30 a.m.-12:15 p.m.

Response to Societal Trends: Insights on How Social Justice, Climate Change and DEIB Intersect With Workplace Policies and Practices

Discover how emerging trends—including burnout; digital transformation; generational shifts; economic uncertainty; and evolving diversity, equity, inclusion and belonging (DEIB) expectations—are shaping the workforce and how strategic responses can foster engagement, trust and performance. Through an interactive breakout discussion, you'll gain actionable insights to help future-proof workplace culture and lead meaningful changes in your organization. Join us in reimagining the future of work!

Speaker: **Christina Furtado**, Mental Health and Wellness Specialist,
GuardMe Wellness & Learning Initiatives



Join Us in Niagara-on-the-Lake this June for an incredible opportunity to learn, network and recharge at White Oaks Conference Resort & Spa.

Hotel Information

White Oaks Conference Resort & Spa

Reservation Deadline: Thursday, May 22, 2025

Rates: C\$239 single/double occupancy

Hotel Accommodations: Visit our Hotel/Travel tab at www.ifebp.org/evolvehotel to book your hotel reservations online. For hotel questions, contact the Registration Department at (888) 334-3327, option 2, or edreg@ifebp.org.

Note: Hotel room availability is not guaranteed outside of scheduled program dates.

Taxes and Fees (subject to change): 13% HST and 4% GST

Resort Fee: C\$15/night per room

Resort Fee Includes:

- High speed Wi-Fi
- Free self-parking
- Access to the fitness centre
- Access to the racquet club
- Access to the indoor pool
- Concierge services
- Unlimited local phone calls

Hotel Cancellation Policy: Cancellations within 48 hours of the scheduled arrival date will incur a cancellation fee equal to the entire stay of the reservation booked.

Come for the education and stay for the recreation!

Niagara-on-the-Lake, often called the loveliest town in Ontario, features many attractions including historic sites, the Shaw Festival with its three theatres, the marina, the heritage business district, unique shopping, fine dining, golf courses, beautiful parks and farmland, and the world-famous Niagara wineries. In addition to a full suite of spa services, White Oaks Conference Resort & Spa offers daily tours of local wineries.



Sponsorship Opportunities

EVOLVE is all about engagement! Exhibit or sponsor and benefit from a unique opportunity to network with Canadian HR, pensions and benefits leaders.

FANTASTIC NETWORKING OPPORTUNITY!

Table Sponsorships—C\$6,000 (value of C\$8,970)

Sponsor a table of 6 (six) and invite your clients/colleagues to be your guests in a collaborative environment. Demonstrate your support for benefits education and gain visibility for your organization. Includes table signage with logo.

Exhibit Tables Available—Showcase your brand and thought leadership with a tabletop exhibit. Secure your booth by May 13 and save C\$300!



Sponsorships—Choose from three levels of brand exposure that include numerous rewards to add value to your sponsor dollar.

Sponsorship Levels

Gold

Tote Bags (exclusive) | Branded Box Lunch (exclusive) |
Networking Receptions | Session Moderator

*Includes one complimentary full-conference registration, **plus** one at a 50% discount.*

Silver

Lanyards (exclusive) | Continental Breakfasts | Attendee Lunch

Includes one complimentary full-conference registration.

Bronze

Refreshment Breaks

Includes one conference registration at a 50% discount.

For More Information, Contact:

Exhibits—Julie Ichiba, jichiba@ifebp.org or (262) 373-7674

Sponsorships—Diane Mahler, dianem@ifebp.org or (262) 373-7656

REGISTRATION

Register today at www.ifebp.org/EVOLVE.

CONFERENCE REGISTRATION FEES

Employer/Plan Sponsor

| | |
|----------------------|--|
| Through May 13, 2025 | Member: C\$1,095 Nonmember: C\$1,425 |
| After May 13, 2025 | Member: C\$1,395 Nonmember: C\$1,725 |

Service Provider/Vendor

| | |
|----------------------|--|
| Through May 13, 2025 | Member: C\$1,495 Nonmember: C\$1,825 |
| After May 13, 2025 | Member: C\$1,795 Nonmember: C\$2,125 |

Save C\$300 when you register by May 13!

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. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.



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



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Sessions Include:

- KEYNOTE: Resilience Through Adversity
- Strategies for Creating and Implementing a Neurodiversity-Friendly HR and Benefits Strategy
- Revolutionizing Employee Engagement With Hyperpersonalized Benefits
- AI and Retirement Planning: What Does the Future Hold?
- CAPSA and Other DC Developments: What Plan Sponsors Need to Know

**Register by May 13 to save C\$300
with the early registration discount!**

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to register, or call (888) 334-3327,
option 2, for more information.

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