

THE OSGOODE CERTIFICATE IN PENSION LAW

February 10, 17, 24, March 3, 10 & 24, 2021
6 days over 6 weeks • Online only

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 regulation and reform across Canada: the new regimes and their implications
- Problems with handling plans during mergers, acquisitions and takeovers

Register today at:

osgoodepd.ca/pensionlaw

Program Directors

Kim Ozubko
Miller Thomson LLP

Jeffrey Sommers
Blake, Cassels & Graydon LLP

Location

ONLINE – Live & Interactive

You will have online access to the program for 120 days.

The Osgoode Certificate in Pension Law

Register today at:

[osgoodepd.ca/
pensionlaw](https://osgoodepd.ca/pensionlaw)

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

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 11th 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.



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
- Annuity purchases

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

Register today at:

[osgoodepd.ca/
pensionlaw](https://osgoodepd.ca/pensionlaw)

Agenda

MODULE 1

February 10, 2021
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

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/Toronto)

MODULE 2

February 17, 2021
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

Faculty

John D.R. Craig

Fasken Martineau DuMoulin LLP

Clio Godkewitsch

Goldblatt Partners LLP

Sean Maxwell

Blake, Cassels & Graydon LLP

John Prezioso

Brown Mills Klinck Prezioso LLP

Mark Zigler

Koskie Minsky LLP

MODULE 3

February 24, 2021
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

Faculty

Scott Cushing

Principal, Mercer

Joseph Fung

Principal, Mercer

Hrvoje Lakota, FSA, CFA, FCIA

Principal, Mercer Global Investments
Canada Limited

Jeffrey Sommers

Blake, Cassels & Graydon LLP

Charley Butler

Managing Director, Member Experience & Innovation, Ontario Teachers' Pension Plan

Register today at:

osgoodepd.ca/pensionlaw

MODULE 4

March 3, 2021
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

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

John M Solorsh

Partner Emeritus, Blake, Cassels & Graydon LLP

Faculty

Andrea Boctor

Stikeman Elliott LLP

Patrick Denroche

Torys LLP

Jonathan Marin

Osler, Hoskin & Harcourt LLP

Susan Nickerson

Torys LLP

MODULE 5

March 10, 2021
9:00 a.m. – 4:30 p.m. EDT
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

Annuity Purchases

Pension Governance Roundtable

Faculty

Charley Butler

Managing Director, Member Experience & Innovation, Ontario Teachers' Pension Plan

Mark Firman

Stikeman Elliott LLP

Terra Klinck

Brown Mills Klinck Prezios

Mariana MacIntosh

Director & Associate General Counsel, Pension Administration, Ontario Teachers' Pension Plan

Tejash (TJ) Modi, B.A., J.D., M.B.A.

Vice President & Practice Leader
Regulatory, Governance & Legal
Consulting Practice Retirement Solutions,
Morneau Shepell Ltd.

Adam Ngan

Blake, Cassels & Graydon LLP

Kim Ozubko

Miller Thomson LLP

Susan G. Seller

Bennett Jones LLP

H. Hugh Kerr

Vice-President & Associate General Counsel,
Sun Life Assurance Company of Canada

MODULE 6

March 24, 2021
9:00 a.m. – 4:00 p.m. EDT
Pension Reform

Pension regulation across Canada has undergone major transformations in recent years. In this final module, experts from across Canada will review the different regimes and explain the significance of the differences.

Overview of B.C. and Alberta Pension Law

Basic Principles of Quebec Pension Law

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

Director, Legal Services & Deputy General Counsel, Legal and Enforcement Division,
Financial Services Regulatory Authority (FSRA)

Faculty

Taylor Buckley

Dentons Canada LLP (Vancouver)

Natalie Bussière

Blake Cassels & Graydon LLP (Montreal)

Level Chan

Stewart McKelvey (Halifax)

Karen DeBortoli, B.A., LL.B.

Director, Knowledge Research Centre, Buck

James Fera

Director, Legal Affairs, CAAT Pension Plan

Scott Sweatman

Dentons Canada LLP (Vancouver)

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

*Now in it's
11th year, join
100's of other
certificate
graduates
who use their
training daily.*

Register today at:

[osgoodepd.ca/
pensionlaw](http://osgoodepd.ca/pensionlaw)

Program Faculty

Randy Bauslaugh

McCarthy Tétrault LLP

Susan Bird, CEBS, Fellow ISCEBS, ICD.D

Chair, World Pension Alliance & President,
The McAteer Group of Companies

Andrea Bector

Osler, Hoskin & Harcourt LLP

Elizabeth Boyd

Blake, Cassels & Graydon LLP

Taylor Buckley

Dentons Canada LLP (Vancouver)

Natalie Bussière

Blake Cassels & Graydon LLP (Montreal)

Charley Butler

Managing Director, Member Experience &
Innovation, Ontario Teachers' Pension Plan

Level Chan

Stewart McKelvey (Halifax)

John D.R. Craig

Fasken Martineau DuMoulin LLP

Scott Cushing

Principal, Mercer

Karen DeBortoli, B.A., LL.B.

Director, Knowledge Research Centre, Buck

Patrick Denroche

Torys LLP

James Fera

Director, Legal Affairs, CAAT Pension Plan

Mark Firman

Stikeman Elliott LLP

Joseph Fung

Principal, Mercer

Clio Godkewitsch

Goldblatt Partners LLP

Reesha Hosein

Director, Legal Services & Deputy General
Counsel, Legal and Enforcement Division,
Financial Services Regulatory Authority (FSRA)

Stephanie J. Kalinowski

Hicks Morley Hamilton Stewart Storie LLP

H. Hugh Kerr

Vice-President & Associate General Counsel,
Sun Life Assurance Company of Canada

Terra Klinck

Brown Mills Klinck Prezioso LLP

Hrvoje Lakota, FSA, CFA, FCIA

Principal, Mercer Global Investments
Canada Limited

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.

Vice President & Practice Leader
Regulatory, Governance & Legal
Consulting Practice Retirement Solutions,
Morneau Shepell Ltd.

Adam Ngan

Blake, Cassels & Graydon LLP

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 (Vancouver)

Susan Ursel

Ursel Phillips Fellows Hopkins LLP

Deron P. Waldock

McCarthy Tétrault LLP

Michael Wolpert

Fasken Martineau DuMoulin LLP
(Calgary/Toronto)

Mark Zigler

Koskie Minsky LLP

Registration Details

Fee per Delegate

\$3,795 + HST

Government rate: \$3,495 + HST

Newly Licensed (2017 – present): \$1,997.50 + HST

Fees include attendance, electronic materials, technical support and 120-day access to program archives. Visit www.osgoodepd.ca/financial-assistance for details about financial assistance.

Program Changes

We will make every effort to present the program as advertised, but it may be necessary to change the date, location, speakers or content with little or no notice. In the event of program cancellation, York University's and Osgoode Hall Law School's liability is limited to reimbursement of paid fees.

Cancellations and Substitutions

Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 21 days prior to the program date. If a cancellation request is made with less than 21 days notice, a \$150 administration fee will apply. No other refund is available.

For Further Program-Related Information, Please Contact:

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

Certificate of Program Completion

You will receive a certificate upon completion of **The Osgoode Certificate in Pension Law. To be eligible for the certificate participants** must attend all program modules (either via live ZOOM or OnDemand) and pass the post-program multiple choice assessment.

4 Convenient Ways to Register



Mail



Online



Fax



Call

Register today at:

osgoodepd.ca/pensionlaw



OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSO.



Eligible CPD Hours – LSO (ON): 38h 50m CPD (34h 50m Substantive; 4h Professionalism)

OsgoodePD programs may be eligible for CPD/MCLE credits in other Canadian and US jurisdictions. To inquire about credit eligibility, please contact cpd@osgoode.yorku.ca

“I am in-house counsel and I have been asked to advise the pension committee with very little background in pension law. This program has provided a great foundation for future learning and development. I would highly recommend it to others involved in pension administration.”

Kendell Wilde, Legal Counsel, Babcock & Wilcox Power Generation Canada Corp.

“This entire program has been excellent! As a manager in accounting who primarily advises on plan administration, I will be able to use this information to better advise plan members.”

Michael Humphries, Manager, Accounting Services, ETFO

Can't wait until February 2021?

Get on-demand access to the Spring 2020 *Certificate in Pension Law* recordings with the same outstanding faculty and content, plus earn a certificate!

Learn more at:

osgoodepd.ca/pensiononline