



THE OSGOODE CERTIFICATE IN PENSION LAW

If you advise on or make decisions on pension issues, get the skills and knowledge you need to navigate this complex area.

Designed and taught by Canada's leading pension experts, this unique program will give you the tools, strategies and practical insights that you need to drill down on key issues, including:

- Pension plan funding and investment
- Single employer, multi-employer and jointly sponsored plans
- Taxation of pension plans and retirement savings plans
- Pension plan governance and managing Board risk
- Cross-country check-up – comprehensive updates from across Canada



The Osgoode Certificate in Pension Law is now eligible for OSAP Micro-Credentials funding. To learn more, please visit: osgoodepd.ca/osap-cle

PROGRAM DIRECTORS

Kim Ozubko

Senior Counsel, RBC

Jeffrey Sommers

Blake, Cassels & Graydon LLP

REGISTRATION DETAILS

February 9, 16, 23,
March 2, 9 and 23, 2022:
6 days over 6 weeks
Online, Live

Can't make the date?

Registration includes 120-day unlimited, online access to the recorded program.

Register today at:

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The Osgoode Certificate in Pension Law

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Don't miss this rare opportunity to master both the big picture of pension regulation and its applications to the situations you encounter frequently.

Pension law and regulation is complex, technical and to the untrained, a minefield of potential liability.

Now in its 12th year, the **Osgoode Certificate in Pension Law** is the most comprehensive pension law program in Canada. Designed for both the pension professional without legal training, and legal professionals whose practice includes pension issues, you will get a comprehensive grounding in key pension issues enabling you to advise and act with confidence.

Our expert faculty from across Canada, will give you the tools, strategies and insights you need in your day-to-day work, along with valuable networking contacts.

Over 6 one-day modules, you will get the practical knowledge and skills you need to understand and tackle the most pressing issues out there.

Designed for online, this intensive program will give you ample opportunity to get your questions answered by the experts, and to engage with your peers in thoughtful, considered debate.

Space fills up quickly. Register now to secure your spot.



What You Will Learn

- Comprehensive overview of the Canadian retirement system
- The anatomy of a pension plan
- Pension funding requirements and investment principles
- Taxation of retirement plans
- Defined contribution plans: the CAP guidelines and CAPSA DC plans guidelines
- Multi-employer pension plans (MEPPs) – governance, plan design and funding challenges
- Due diligence and corporate transactions – transitioning from DB to DC
- Pension plan governance – tools and strategies for managing Board risk
- Pension governance and risk management: single employer, multi-employer and jointly governed target benefit plans and pooled registered pension plans (PRPPs)
- Labour law issues in pensions – management and union perspectives
- Employment, human rights and privacy issues in pensions
- Pension plan restructuring – bankruptcy and insolvency
- Cross-country check-up – comprehensive updates and the latest trends from across Canada
- Impact of climate change on pension plan fiduciaries and policy makers

Who Should Attend

- Pension professionals, including plan administrators and managers
- Pension lawyers in private practice
- In-house counsel
- HR professionals who oversee pension management
- Provincial and Federal pension regulators

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Drawing on the expertise and experience of leading pension lawyers and pension professionals, including:

Program Directors



Kim Ozubko

Senior Counsel, RBC



Jeffrey Sommers

Blake, Cassels & Graydon LLP

*Now in its
12th year, find
out why 500+
of your peers
have completed
this certificate.*

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

Program Faculty

Randy Bauslaugh

McCarthy Tétrault LLP

Susan Bird

President, McAteer Group of Companies

Andrea Bector

Osler, Hoskin & Harcourt LLP

Elizabeth Boyd

Blake, Cassels & Graydon LLP

Taylor Buckley

Dentons, Vancouver

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Level Chan

Stewart McKelvey, Halifax

Lindy Charles

Director, Actuarial Services & Tax,
Ontario Teachers' Pension Plan

Scott Cushing

Principal, Mercer

John Craig

Mathews Dinsdale & Clark LLP

Karen DeBortoli

Director, Knowledge Resource Centre &
Canadian Privacy Officer at Buck

Kathryn Esaw

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Director, Legal Affairs, CAAT Pension Plan

Mark Firman

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Principal, Mercer

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Hugh Kerr

Commercial lawyer, Executive, Advisor

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VP Portfolio Construction, Investment
Management Corporation of Ontario (IMCO)

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Ontario Teachers' Pension Plan

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Partner & Practice Leader, Regulatory,
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Willis Towers Watson LLP

Susan Seller

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Susan Ursel

Ursel Phillips Fellows Hopkinson LLP

Deron P. Waldock

McCarthy Tétrault LLP

Michael Wolpert

Fasken Martineau DuMoulin LLP
(Calgary/Toronto)

Mark Zigler

Koskie Minsky LLP

Agenda

MODULE 1

February 9, 2022
9:00 a.m. – 4:30 p.m. ET
The Retirement Savings System

Different Types of Pension Plans

- Defined benefit (DB)
- Defined contribution (DC)
- Multi-employer pension plan
- Jointly sponsored pension plan
- Public sector
- Canada/Quebec Pension Plan and Old Age Security (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

Taxation of Retirement 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

Governance of Unionized Multi-Employer Pension Plans (MEPPs)

Faculty

Susan Bird

President, McAteer Group of Companies

Elizabeth Boyd

Blake Cassels & Graydon LLP

Stephanie J. Kalinowski

Hicks Morley Hamilton Stewart Storie LLP

Kim Ozubko

Senior Counsel, RBC

Michelle Rival

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Michael Wolpert

Fasken Martineau DuMoulin LLP
(Calgary/Toronto)

MODULE 2

February 16, 2022
9:00 a.m. – 4:15 p.m. ET
Pensions and the Employment Relationship

The Employment Relationship: Common Law and Statutory Provisions

- Common law and statutory regulation of the employment relationship
- Basic principles of the employment relationship
- Pensions as a part of total compensation
- Changing the terms of employment
- Termination of the employment relationship

Labour Law Issues in Pensions: Management and Union Perspectives

- Pensions in collective bargaining
- The employer-union-employee relationship
- Incorporating pension plans into a collective agreement
- Jurisdictional issues: arbitrator, pension regulator, courts

Privacy and Human Rights Considerations

Faculty

Clio Godkewitsch

Goldblatt Partners LLP

Sean Maxwell

Blake, Cassels & Graydon LLP

John Prezioso

Brown Mills Klinck Prezioso LLP

John D.R. Craig

Mathews Dinsdale & Clark LLP

Mark Zigler

Koskie Minsky LLP

MODULE 3

February 23, 2022
9:00 a.m. – 4:15 p.m. ET*
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 statements

Regulatory Requirements and Reform of Pension Fund Investment Regulations

Pension Investment Topics: Investment Principles/Liability Studies, Investment Strategies

Recent Developments in Environmental, Social and Governance (ESG) Initiatives

Faculty

Randy Bauslaugh

McCarthy Tétrault LLP

Scott Cushing

Principal, Mercer

Joseph Fung

Principal, Mercer

Hrvoje Lakota

VP, Portfolio Construction, Investment Management Corporation of Ontario (IMCO)

Adam Ngan

Blake, Cassels & Graydon LLP

Jeffrey Sommers

Blake, Cassels & Graydon LLP

*Networking Event 4:15 p.m. – 5:30 p.m. ET

Mark your calendar! You are invited to our virtual networking cocktail party which is being held on February 23rd from 4:15 p.m. – 5:30 p.m. ET.

MODULE 4

March 2, 2022
9:00 a.m. – 4:15 p.m. ET
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

Insolvency and Restructuring Primer

- The different insolvency or restructuring mechanisms and how they impact on pension plans: restructuring, financing, receivership and bankruptcy
- The *Companies' Creditors Arrangement Act* and the *Bankruptcy and Insolvency Act*
- Pension Benefits Guarantee Fund (PBGF)

College of Applied Arts and Technology (CAAT) and the Conversion to CAAT

Faculty

Andrea Boctor

Osler, Hoskin & Harcourt LLP

Kathryn Esaw

Osler, Hoskin & Harcourt LLP

James Fera

Director, Legal Affairs, CAAT Pension Plan

Jonathan Marin

Osler, Hoskin & Harcourt LLP

Susan Nickerson

Torys LLP

Susan Ursel

Ursel Phillips Fellows Hopkinson LLP

MODULE 5

March 9, 2022
9:00 a.m. – 4:30 p.m. ET
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 pooled registered pension plans (PRPPs)

Governance Policies: Funding, Investment, Record Keeping, Member Inquiries

Pension Governance Risk Management: Single Employer, Multi-Employer, Jointly Sponsored Target Benefit Plans and Pooled Registered Pension Plans (PRPPs)

Annuity Purchases

Ontario Teachers' Pension Plan: Administration and Structure

Faculty

Lindy Charles

Director Actuarial Services & Tax,
Ontario Teachers' Pension Plan

Mark Firman

Stikeman Elliott LLP

Hugh Kerr

Commercial lawyer, Executive, Advisor

Terra Klinck

Brown Mills Klinck Prezioso LLP

Mariana MacIntosh

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

Tejash (TJ) Modi

Partner and Practice Leader, Regulatory,
Governance & Legal Consulting Practice at
LifeWorks Wellbeing Solutions

Kim Ozubko

Senior Counsel, RBC

Susan G. Seller

Bennett Jones LLP

MODULE 6

March 23, 2022
9:00 a.m. – 4:30 p.m. ET
A Cross Country Check-Up

In the final module of the program, experts from across Canada will review the different pension regimes and highlight any important cases/legislation. Also included in this module is a look at work and impact the Financial Services Regulatory Authority (FSRA) on pensions in Ontario.

Pension Law in Atlantic Canada

Basic Principles of Quebec Pension Law

Ontario Pension Law

BC/Alberta Pension Law

Faculty

Taylor Buckley

Dentons, Vancouver

Natalie Bussière

Blake, Cassels & Graydon LLP, Montréal

Level Chan

Stewart McKelvey, Halifax

Reesha Hosein

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

Karen DeBortoli

Director, Knowledge Resource Centre and Canadian Privacy Officer at Buck

Register today at:

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Registration Details

Fee per Delegate: \$3,995 + TAX

Newly Licensed*: 50% off regular rate + TAX

**This fee applies to newly licensed professionals within the past 2 years*

Fees include online attendance and electronic copies of program materials. Participants will have access to the recorded archive sessions of this program for 120 days from the date of program completion. 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:

David Thomas, Program Lawyer at 416.270.7316 or email dthomas@osgoode.yorku.ca

Certificate of Program Completion

You will receive a certificate upon completion of **The Osgoode Certificate in Pension Law**. Participants must view all program modules (either live or archived) and **pass the post-program multiple choice assessment** to receive a certificate.

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“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 and Manager of Human Resources, Babcock & Wilcox 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, Elementary Teachers' Federation of Ontario

“Online experience was excellent.”

Regan Ruslim, Senior Legal Counsel, Hydro One Networks Inc.

“An excellent program.”

Angela Winder, Fund Administrator, Carleton University

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