



THE OSGOODE CERTIFICATE IN PENSION LAW

Now in its
14th Year!

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

PROGRAM DIRECTORS

Kim Ozubko

General Counsel & Corporate
Secretary, Eckler Ltd

Jeffrey Sommers

Blake, Cassels & Graydon LLP

REGISTRATION DETAILS

February 6, 13, 20, 27 and
March 5, 19, 2024:
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:
[osgoodepd.ca/
pensionlaw](https://osgoodepd.ca/pensionlaw)

The Osgoode Certificate in Pension Law

Register today at:

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

Over 600+ pension professionals have this Certificate – find out why.

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

This unique foundational course, **now in its 14th year**, 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.

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.

Don't miss your opportunity to participate in the country's leading pension law program!



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)
- Developing and maintaining governance policies, including cyber security and information policies
- 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
- Environmental, social and governance – recent developments

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

Register today at:

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

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

Program Directors



Kim Ozubko

General Counsel &
Corporate Secretary, Eckler Ltd



Jeffrey Sommers

Blake, Cassels & Graydon LLP

Program Faculty

Randy Bauslaugh

Bauslaugh Pensions & Benefits Law

Susan Bird

President, McAteer Group of Companies

Andrea Boctor

Osler, Hoskin & Harcourt LLP

Elizabeth Boyd

Blake, Cassels & Graydon LLP

Taylor Buckley

Senior Counsel, Sun Life - Group
Retirement Solutions, Vancouver

Natalie Bussière

Blake, Cassels & Graydon LLP, Montréal

Level Chan

Stewart McKelvey, Halifax

John Craig

Mathews Dinsdale & Clark LLP

Karen DeBortoli

Director, Knowledge Resource Centre & Canadian
Privacy Officer at Buck

Patrick Denroche

Mintz Canada

Kathryn Esaw

Osler, Hoskin & Harcourt LLP

James Fera

Director, Legal Affairs, CAAT Pension Plan

Joseph Fung

Principal, Mercer

Clio Godkewitsch

Goldblatt Partners LLP

Reesha Hosein

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

Hrvoje Lakota

Managing Director, Portfolio Construction,
Investment Management Corporation of
Ontario (IMCO)

Jonathan Marin

Osler, Hoskin & Harcourt LLP

Sean Maxwell

Blake, Cassels & Graydon LLP

Lindsay McLeod

Brown Mills Klinck Prezioso LLP

Paul Migicovsky

Counsel, Pension Legal and Plan Policy, OMERS

Tejash (TJ) Modi

Partner and Practice Leader, Regulatory,
Governance & Legal Consulting Practice,
TELUS Health

Shane Morganstein

Borden Ladner Gervais LLP

Adam Ngan

Blake, Cassels & Graydon LLP

Kim Ozubko

General Counsel & Corporate Secretary, Eckler Ltd

John Prezioso

Brown Mills Klinck Prezioso LLP

Michelle Rival

Senior CONSULTING Lawyer,
Willis Towers Watson LLP

Susan Seller

Bennett Jones LLP

Jeffrey Sommers

Blake, Cassels & Graydon LLP

Omar Sunderji

Osler, Hoskin & Harcourt LLP

Susie Taing

General Counsel & Chief Compliance Officer,
Brookfield Annuity

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

“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

Senior Counsel and Manager of
Human Resources, Babcock & Wilcox
Canada Corp.

Register today at:

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

Agenda

Virtual Pre-Program Kickoff and Networking Event (Optional)

*Join us online the week prior to the start of the program, where you will meet with your Program Directors, review program requirements and network with your peers.
February 2, 2024 at 12 p.m. – 1 p.m. ET*

MODULE 1

February 6, 2024
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

Kim Ozubko

General Counsel & Corporate Secretary,
Eckler Ltd

Michelle Rival

Senior Consulting Lawyer, Willis Towers Watson

Jeffrey Sommers

Blake, Cassels & Graydon LLP

Deron P. Waldock

McCarthy Tétrault LLP

Michael Wolpert

Fasken Martineau DuMoulin LLP
(Calgary/Toronto)

MODULE 2

February 13, 2024
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

Shane Morganstein

Borden Ladner Gervais LLP

John Prezioso

Brown Mills Klinck Prezioso LLP

John D.R. Craig

Mathews Dinsdale & Clark LLP

Mark Zigler

Koskie Minsky LLP

MODULE 3

February 20, 2024
9:00 a.m. – 4:00 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

Bauslaugh Pensions & Benefits Law

Joseph Fung

Principal, Mercer

Hrvoje Lakota

Managing Director, Portfolio Construction,
Investment Management Corporation of
Ontario (IMCO)

Adam Ngan

Blake, Cassels & Graydon LLP

Jeffrey Sommers

Blake, Cassels & Graydon LLP

MODULE 4

February 27, 2024
9:00 a.m. – 4:30 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

Omar Sunderji

Osler, Hoskin & Harcourt LLP

Susan Ursel

Ursel Phillips Fellows Hopkinson LLP

MODULE 5

March 5, 2024
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

Lindsay McLeod

Brown Mills Klinck Prezioso LLP

Paul Migicovsky

Counsel, Pension Legal and Plan Policy, OMERS

Tejash (TJ) Modi

Partner and Practice Leader, Regulatory,
Governance & Legal Consulting Practice,
TELUS Health

Kim Ozubko

General Counsel & Corporate Secretary,
Eckler Ltd

Susan G. Seller

Bennett Jones LLP

Susie Taing

General Counsel & Chief Compliance Officer,
Brookfield Annuity

MODULE 6

March 19, 2024
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

Senior Counsel, Sun Life - Group Retirement
Solutions, 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:

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

Registration Details

Fee per Delegate: \$4,295 + TAX

Newly Licensed*: \$2,147.50 + TAX

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

Fees include online attendance, electronic materials, and technical support.

Financial Assistance

This program is eligible for OSAP funding. Federal and provincial job grants may be available. You may also apply for financial assistance with OsgoodePD. To learn more, visit: www.osgoodepd.ca/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 Requirements

To receive an Osgoode Certificate, you must view all program modules (either live or archived) and pass the post-program multiple choice assessment by April 18, 2024.

Register today at:

osgoodepd.ca/pensionlaw

 **Email:** osgoodepd@osgoode.yorku.ca

 **Phone:** 416 597 9724

 **Mail:** 1 Dundas Street West, 26th Floor, Toronto, ON, M5G 1Z3



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



Eligible CPD Hours – LSO (ON): 37h 25m CPD
(33h 25m 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

“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

“All of Module 2 Faculty structured their material logically, beginning with foundations and moving to the more complex. This makes their presentations very accessible ... All were engaging speakers, and gave relevant, straightforward responses to student questions.”

Alan Bakker, Assistant General Counsel, RBC Law Group, RBC Insurance

“Very experienced and knowledgeable faculty.”

Janet Greenwood, Vice President, Investment Solutions, Scotia Global Asset Management

“I work in the pension industry and am thrilled at how well the materials [for Module 1] pulled the key elements together. I look forward to what is ahead.”

Tricia Brown, Director, Policy and Governance, Public Employees Benefits Agency

“All segments provided excellent information.”

Heather Keough, Director, People and Culture, Provident10