

PENSION AND RETIREMENT ASSETS UPON RELATIONSHIP BREAKDOWN

Can't make the date?
Registration includes
120-day unlimited,
online access to the
recorded program

When a relationship ends, dividing pensions and other retirements assets is complex and technical. Get the expert guidance you need to advise with confidence.

- 'Til Death Do Us Part – Dealing with retirement assets on death
- Strategies for dealing with the common payment pitfalls
- New FSRA forms – what you need to know to interpret and complete them
- Practical guidance on negotiating and drafting a settlement

Register today at:

osgoodepd.ca/PBE

PROGRAM CHAIRS

Georgina Carson
Carson Lein LLP

Anne Slivinskis
Senior Legal Counsel,
University Pension Plan

REGISTRATION OPTIONS

Tuesday, April 5, 2022:

Online, Live

9:00 a.m. – 4:30 p.m. ET

OR

Thursday, May 5, 2022:

Online Replay

9:00 a.m. – 4:30 p.m. ET

Pension and Retirement Assets Upon Relationship Breakdown

What pension professionals wish Family lawyers understood and what Family lawyers want pension professionals to know.

This unique one day program brings together family law, pensions and actuarial experts. If you practice in family law or work in pensions, this must attend program will provide you with the key knowledge and practical strategies you need to tackle the most challenging issues in pension and retirement asset entitlement that arise on relationship breakdown.

All new content for 2022 includes:

- Interpreting the Statement of Family Law Value and other tips for the new FSRA forms
- Navigating thorny valuation issues with foreign and extra-provincial pensions
- Special challenges valuing federal plans
- Tricky tax implications that can trip up a settlement
- Critical differences between designated beneficiary vs spousal survivor benefits – and why you need to understand them

Who Should Attend

- Family Lawyers
- Pension Lawyers
- Pension Administrators
- Financial Advisors

“Speakers and topics presented [were] interesting and concise... [a] very productive day.”

Charles Brophy
Brophy Financial Planning

Register today at:

osgoodepd.ca/PBE

Agenda

9:00 a.m.

Welcome from the Chairs

Georgina Carson

Carson Lein LLP

Anne Slivinskis

Senior Legal Counsel,
University Pension Plan

9:05 a.m.

Retirements Assets As Property – Foundational Concepts

Georgina Carson

Carson Lein LLP

Anne Slivinskis

Senior Legal Counsel,
University Pension Plan

We will start the day with a broad strokes overview of the key concepts, in including:

- Legislative Framework: Interconnection of family law and pension law
- Key concepts in equalization
- Identification of retirement assets: CPP, employment pensions, personal retirement savings (RRSPs, LIRAS, etc.)
- Valuation of retirement assets – the basics
- Satisfying an equalization entitlement with pension assets

9:50 a.m.

‘Til Death Do Us Part – Dealing with Retirement Assets On Death

Emily Hubling

Fasken Martineau DuMoulin LLP

Paul Migicovsky

Counsel, Pension Legal & Plan Policy, OMERS

Michael Zalev

Epstein Cole LLP

- Estate law: Review of key concepts, strategies and best practices for preserving claims
- How to deal with different retirement assets on death of member and death of recipient
- Ont CA decision in *Meloche*: What happens on death of recipient spouse

10:35 a.m.
Health Break

10:50 a.m.

Extra-Provincial and International Pension Challenges

Sarah Boulby

Boulby Weinberg LLP

Martin Desautels, LLB, FSA, FICA

Directeur, Retraite, Director, Retirement, Willis Towers Watson

David Wolgelerenter, BSc, FSA, FCIA, MBA

DSW Actuarial Services Inc.

- Determining what rules apply
- Valuation issues with foreign and extra-provincial pensions
- Navigating international issues around pensions and retirement assets
- Implementing foreign orders
- Out of province separations and court orders
- Multi-jurisdictional pension plans
- Quebec's distinct rules

11:35 a.m.

Federal Pension Plans

Kelley McKeating, FSA, FCIA

McKeating Actuarial Services, Inc.

Michelle Rival

Senior Consulting Lawyer, Willis Towers Watson

- Special challenges valuing federal plans
- Navigating which legislation applies
- "Where reasonably possible ... with necessary modifications" How to put a square peg in a round hole: strategies for navigating s. 10.1(2) FLA
- Implementation quirks

12:05 p.m.

Lunch Break

1:00 p.m.

Survivor Benefits: Entitlement, Waiver and Valuation

Wendela M. Napier

Managing Lawyer, Unifor Legal Services Plan

Adam K. Ngan

Blake, Cassels & Graydon LLP

- Critical differences between designated beneficiary vs spousal survivor benefits
- When is a plan member living separate and apart? Scope of the administrator's responsibilities to determine spousal status
- Survivor benefits as property
- Post-Retirement Spousal Waiver
- Considerations for Co-Habitation and Marriage Contracts

1:45 p.m.

Payment Problems Potpourri

Stephanie Kalinowski

Hicks Morley LLP

Daniel Strachan

Senior Advisor – Plan and Policy Development, Healthcare of Ontario Pension Plan (HOOPP)

- Pensions in Pay and Pensions Not in Pay
- Arrears and Interest
- % vs quantified amount
- Guidance on interest: impact on pension holder and how it's paid out
- Disposition costs

2:15 p.m.

Health Break

2:30 p.m.

The New FSRA Family Law Forms – What You Need to Know

Emma Compeau

Carson Lein LLP

Hae-Jin Kim

Senior Policy Analyst, Pensions, Financial Services Regulatory Authority of Ontario

The new forms are here and will be mandatory by April. Get expert guidance on how to interpret and complete them.

- Overview of updated FSRA Family Law Forms

- Elimination of Form 7 – Implications for plan administrators
- Interpreting the Statement of Family Law Value

3:00 p.m.

The Long and Winding Road: From Valuation to Settlement to Implementation

Kathy Batycky

Stoner & Company Family Law

Lindy Charles

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

Key issues to consider when negotiating and drafting a settlement, including:

- Steps after valuation
- Understanding tax implications
- Reaching resolution
- Drafting tips and Implementation by the administrator, dealing with ambiguity

Red Flags and Blue Sky Roundtable: What to Watch Out For and Anticipate

Georgina Carson

Carson Lein LLP

Robert A. Klotz

Klotz Associates

Lesla MacDonald

Koskie Minsky LLP

Jennifer Rook

Head, Pension Plan Operations and Regulatory Effectiveness, Financial Services Regulatory Authority of Ontario

Anne Slivinskis

Senior Legal Counsel, University Pension Plan

- Multi-employer pension plans: special considerations for valuation and division
- Impact of bankruptcy on equalization claims against pensions and RRSPs and how to preserve claims
- FSRA rule making authority on pension valuation and division: an overview of the process and opportunities to collaborate

4:30 p.m.

Program Concludes

Chairs

Georgina L. Carson
MacDonald & Partners LLP

Anne Slivinskis
Senior Legal Counsel,
University Pension Plan

Faculty Includes

Kathy Batycky
Stoner & Company Family Law

Sarah Boulby
Boulby Weinberg LLP

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

Emma Compeau
Carson Lein LLP

Martin Desautels, LLB, FSA,
FICA Directeur, Retraite, Director,
Retirement, Willis Towers Watson

Emily Hubling
Fasken Martineau DuMoulin LLP

Stephanie Kalinowski
Hicks Morley LLP

Hae-Jin Kim
Senior Policy Analyst, Pensions,
Financial Services Regulatory
Authority of Ontario

Robert A. Klotz
Klotz Associates

Lesa MacDonald
Koskie Minsky LLP

Kelley McKeating, FSA, FCIA,
McKeating Actuarial Services, Inc.

Paul Migicovsky
Counsel, Pension Legal & Plan
Policy, OMERS

Wendela M. Napier
Managing Lawyer, Unifor Legal
Services Plan

Adam K. Ngan
Blake, Cassels & Graydon LLP

Michelle Rival
Senior Consulting Lawyer,
Willis Towers Watson

Jennifer Rook
Head, Pension Plan Operations and
Regulatory Effectiveness, Financial
Services Regulatory Authority of
Ontario

Daniel Strachan
Senior Advisor – Plan and Policy
Development, Healthcare of
Ontario Pension Plan (HOOPP)

David Wolgelerenter,
BSc, FSA, FCIA, MBA
DSW Actuarial Services Inc.

Michael Zalev
Epstein Cole LLP

Registration Details

Fee per Delegate: \$595 plus tax

Newly Licensed*: 50% off regular rate plus tax

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

Fees include online attendance, electronic program materials, and 120-day online access to program archive. Group discounts and financial assistance are available. Visit www.osgoodepd.ca/group-discounts for details.

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 14 days prior to the program date. If a cancellation request is made with less than 14 days notice, a \$75 administration fee will apply. No other refund is available.



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



Eligible CPD Hours – LSO (ON): 6h 30m CPD (5h 30m Substantive, 1h 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.



osgoodepd.ca

Osgoode Professional Development



416.597.9724

1 Dundas Street West, Suite 2600



@OsgoodePD

Toronto, ON Canada M5G 1Z3

OSGOODE
OSGOODE HALL LAW SCHOOL
PROFESSIONAL DEVELOPMENT

YORK
UNIVERSITÉ
UNIVERSITY

Pension and Retirement Assets Upon Relationship Breakdown

Register today at:

osgoodepd.ca/PBE