

Pension Communication: From Strategy to Implementation

May 20, 2026
Digital Handbook



Presented by:

NIA NATIONAL
INSTITUTE
ON AGEING *

Welcome to the PCE Spring Symposium

Dear PCE Members,

Welcome to the 2026 PCE Spring Symposium.

Today's theme — Pension Communication — is a story of momentum. Over the past decade, stakeholders across the retirement income landscape have made meaningful investments in member communication and education, and the field has advanced significantly as a result. Meanwhile, research has deepened our understanding of what works and why. And now, a shifting pension landscape combined with technological innovation is poised to accelerate progress further.

When crafting the agenda around this exciting and dynamic topic, we took the PCE's goals of **supporting evidence-based solutions** and **turning good ideas into real-world action** to heart. The day's activities will examine pension communication through both a strategic and an implementation lens. From presentations that bring you bold ideas and new research insights, to collaborative activities facilitating knowledge exchange, the sessions are designed to challenge your thinking and provide actionable solutions to your member communication challenges.

Each of you plays a critical role in the Symposium's success. Whether you come from a pension plan, a service provider, a government ministry or a research institution, you bring unique insights and expertise to the discussion — made all the more powerful when you share it with others.

The ideas and experiences you bring forward will **strengthen our collective understanding, shape the PCE's future research agenda** and help us **identify opportunities to move forward**.

We hope the Symposium energizes and challenges you in equal measure.

Thank you for being part of it and for committing to **our shared mission: advancing retirement financial security for all Canadians**.

Warm regards,

Bonnie-Jeanne and Barbara
PCE Co-Leads

PCE Members



Chatham House Rule

To encourage open and productive dialogue, today's sessions will follow the Chatham House Rule. This means you are welcome to use what you hear in general terms, but you may not identify speakers or their affiliations without their expressed permission. In keeping with the spirit of collaboration and respect, participants are also asked not to solicit any products or services during the event.

Spring 2026 Symposium

Wednesday, May 20, 2026 | Deloitte - 8 Adelaide Street West, Toronto, 5th Floor.

Agenda

8:15am – 9:00am	Registration and Networking Breakfast	At registration, you will be asked to select two topics for discussion during the Knowledge Stations session (see below for details)
9:00am – 9:15am	Welcome Remarks & New Member Introductions	
9:15am – 9:30am	PCE Update: 2025 Recap	An update on major PCE milestones to date
9:30am – 10:15am	Strategic Vision for Pension Communication	Panel discussion
10:15am – 10:30am	Member Spotlight #1: Redefining Success: Formally considering member perceptions of value and embedding member confidence in the pension ecosystem as a core pillar of our corporate strategy	Presented by Vestcor
10:30am – 11:00am	Break & Networking	
11:00am – 11:30am	Report Presentation: 3 Solutions to Boost Understanding and Appreciation of Workplace Retirement Plans	Based on the first PCE report: <i>Understanding and Communicating the Value of Workplace Retirement Plans</i>
11:30am – 11:45am	Member Spotlight #2: Segmented Communications: Improving the active member experience	Presented by LAPP
11:45am – 12:45pm	Group Photo + Lunch	

Agenda

12:45pm – 1:00pm	Member Spotlight #3: Can transitioning thousands of plan members to a new pension administrator be easy... dare we say, fun? Yes, it can, and we'll show you how	Presented by Eckler
1:00pm – 2:15pm	Knowledge Stations: Engaging with the Cost of Ageing (COA) Calculator and the 3 Solutions	During this session, participants will visit two of the four Knowledge Stations to discuss the following topics (pre-selected at registration): <ol style="list-style-type: none">1. Use the Cost of Ageing (COA) Calculator2. Adopt the NIA's Retirement Income Framework3. Make the full spectrum of value visible, including the intangible benefits4. Equip members with better decision-making tools
2:15pm – 2:45pm	Break & Networking & Visit Photo Booth	
2:45pm – 3:15pm	Knowledge Station Debrief	
3:15pm – 4:00pm	Pension Engagement: Fact or Fiction?	A game show-style activity where table teams vote on whether statements about pension communication and engagement are true or false. May the best team win!
4:00pm – 4:30pm	2026 Plans, Wrap-up and Photos	

*** Please join us after the Symposium for a networking reception from 4:30-6:00pm on the 6th floor, generously hosted by Deloitte ***

Spring Symposium Attendees

National Institute on Ageing (NIA)



Dr. Bonnie-Jeanne MacDonald

Director of Financial Security Research, Co-Lead, PCE

Bonnie-Jeanne MacDonald serves as the Director of Financial Security Research at the National Institute on Ageing (NIA), Toronto Metropolitan University, where she is also the Co-Lead of NIA's Pension Centre of Excellence. She is a fellow of both the Society of Actuaries and the Canadian Institute of Actuaries, as well as the resident scholar at Eckler Ltd.

Her research focuses on the policies and practices necessary to address the multiple challenges and opportunities presented by Canada's aging population. By bringing together leading industry experts and leveraging academic best practices alongside innovative ideas, Dr. MacDonald's work is dedicated to enhancing retirement financial security for Canadians through practical insights, industry innovations, and government solutions.

She has published academic papers on a wide variety of topics related to retirement financial security. Her research contributions have received numerous awards and have been adopted by industry and government, both in Canada and around the globe. Dr. MacDonald is a prominent speaker at industry and public policy events, as well as a frequent expert voice in Canadian media.



Barbara Sanders

Associate Fellow, Co-Lead, PCE

Barbara Sanders is an Associate Professor of actuarial science at Simon Fraser University and an Associate Fellow at the National Institute on Ageing. A pension-consultant-turned-academic, she is best known for her investigation of risk sharing in occupational pension plans, focusing on design, management and regulation. She has published numerous articles and is frequently invited to speak on these topics.

Combining quantitative research and community engagement, Barbara's work aspires to produce actionable insights to improve public policy and professional practice. She is a member of the C. D. Howe Institute's Pension Policy Council and past chair of the Canadian Institute of Actuaries' Task Force on Target Benefit Plans. She holds a BSc in Mathematics, an MSc in Actuarial Science, and is a Fellow of the Society of Actuaries and of the Canadian Institute of Actuaries.



Alyssa Brierley
Executive Director

Alyssa Brierley is a lawyer and public policy professional with more than a decade of experience in public policy, legal service and operations management. She was most recently the Executive Director at the Centre for Equality Rights in Accommodation (CERA), Canada's leading non-profit organization focused on advancing the right to housing. Over her four years in the post, she led the organization through a significant period of growth and transition that included a national expansion, organizational rebranding, and significant expansion of its research, policy advocacy, strategic litigation and services work.

Prior to joining CERA, Alyssa served as the health, social, justice and labour policy advisor to the President of the Treasury Board of Ontario, and as Director of Policy to the Minister of Economic Development, Employment and Infrastructure. Alyssa has also worked as a legal research and communications advisor to the UN Special Rapporteur on the Right to Food, a lawyer and policy analyst at the Ontario College of Teachers and a Lecturer at Toronto Metropolitan University, and she completed her articles at Torys LLP.

Alyssa holds a Bachelor of Arts degree from the University of Waterloo, a master's degree in political science from York University, a Juris Doctor from Osgoode Hall Law School, and a Certificate in Nonprofit Management from Georgetown University.



Doug Chandler
Senior Researcher

Doug Chandler is a Fellow of the Canadian Institute of Actuaries and a Fellow of the Society of Actuaries, based in Calgary. From 2016 to 2024, he served as the Canadian Retirement Research Actuary at the Society of Actuaries, where he was responsible for developing and completing objective research on Canadian retirement systems to inform public policy development and public understanding.

Previously, he worked for 25 years as a consultant on retirement plans. In addition to providing retirement plan advice to clients, his responsibilities included professional practice leadership, thought leadership and writing for internal and external publications. Doug has been an active volunteer in Canadian Institute of Actuaries task forces on topics such as pension commuted values and accounting for employee future benefits.



He Chen
Senior Researcher

He Chen, FRM, is a Senior Researcher at the National Institute on Ageing, where he focuses on enhancing the financial well-being of older adults. He also serves as a consultant at the Healthcare of Ontario Pension Plan (HOOPP). With over a decade of experience spanning the hedge fund, banking, consulting, and pension plan industries, he brings deep expertise in capital markets and retirement systems. He holds a Master of Mathematics in Actuarial Science and a Bachelor of Mathematics in Actuarial Science & Statistics from the University of Waterloo. He has co-authored multiple publications and reports on retirement financial security and education. In addition to his research and consulting work, He mentors new graduates and young financial professionals, helping them develop the skills needed to thrive in the industry.



Alyssa Hodder
Senior Researcher

Alyssa Hodder is a Senior Researcher with the NIA, responsible for accelerating the public release and early growth of the Cost of Ageing (COA) calculator, while strengthening Pension Centre of Excellence (PCE)-related research capacity and funding opportunities and supporting the growth and enhancing the visibility of the work from the NIA's Financial Security Department.

With more than 20 years of industry experience, her prior roles have included Director of Education and Outreach—Canada with the International Foundation of Employee Benefit Plans; Senior Communications Consultant with Eckler Ltd., providing communications support to public sector, corporate, not-for-profit, trustee and multi-employer plans; and Director of the Knowledge Resource Centre at Buck Consultants. She also spent many years as Editor/Managing Editor of Benefits Canada magazine, with overall responsibility for its print and online editorial operations.

Alyssa earned her Master and Bachelor of Arts degrees (hons) from Queen's University in Kingston, Ontario, as well as her Group Benefits Associate (GBA) designation from the International Foundation. She has also successfully completed the Canadian Securities Course.



Suzy Wilcox

Director of Partnerships and Development

Suzanne (Suzy) is an experienced fundraising leader who loves building relationships that make a positive difference in people's lives and in their communities. Suzy brings decades of varied non-profit and corporate experience to her role in leading NIA's partnerships and fundraising. After graduating from Princeton University, Suzy worked in Marketing and Development at several US arts organizations. She earned her MBA at the University of Toronto's Rotman School of Management before working in research, project management, and client relations at the renowned Toronto sponsorship agency Arts & Communications (A&C), then as Air Canada's Marketing Manager in Toronto.

For 15 years, Suzy was a Senior Associate with NetGain Partners, where she had the pleasure of working with a variety of consulting clients, helping them with strategic planning and different types of fundraising. In this time, Suzy raised significant funds for leading non-profit organizations, such as MOCA, Akin, and Junior Achievement of Central Ontario.

Most recently, Suzy led the fundraising team at Evergreen, raising millions of dollars for Toronto's beloved Evergreen Brick Works and for Evergreen's public space projects across the country.

When not working, Suzy hangs out with her family and cat, dances, swims, golfs, hikes, and tends her wild garden. She used to be a mime, but the rope and the wall only got her so far.



Audrey Forbes

Senior Fellow

Audrey Forbes is a community advocate, a capabilities builder, and a contributor to the common good. She spent over 35 years in pension administration and operational policy in Ontario's broader public sector, and is now retired.

Her career in pensions spanned three of Ontario's large DB pension plan administrators, ending with retirement from OPTrust. Retirement for Audrey includes teaching the Pension Plan Administration Certificate (PPAC) through Humber Polytechnic, contributing as a Senior Fellow with the National Institute on Ageing (NIA) at the Toronto Metropolitan University, and advising on various local boards.

She is an inquisitive lifelong learner and feels most fulfilled when she is writing, teaching, or immersed in public policy discourse. Shortly after retiring, she published a historical fiction children's book called *The Day the Masks Went On*, which she co-authored with her daughter, Kerron. Audrey holds business and public policy degrees from York and Queen's Universities, respectively, and still proudly appreciates her PPAC and CEBS certifications, along with dozens of other certifications and modular business programs.



Gareth Gibbins
Associate Fellow

Gareth Gibbins is a seasoned pension and policy expert with over two decades of experience spanning plan design, governance, legal frameworks, regulatory compliance, research and advocacy. This broad expertise has positioned him as a trusted voice in the field, known for making complex systems understandable and impactful.

Driven by a passion for excellence and innovation in the pension sector, Gareth contributes to leading industry bodies and global initiatives. He is currently an Associate Fellow at the National Institute on Ageing (Pension Centre of Excellence), serves on the International Advisory Board for the World Pension Summit, teaches Pension Plan Administration Courses at Humber College, and co-leads the Social Infrastructure Working Group at the International Centre of Pension Management.

He is also active in Canadian pension and policy activities, having held senior roles with one of Canada's largest pension plans, and has chaired committees across different industry organizations, including with Ontario's pension regulator and the Ontario Bar Association.

With two boys on the autism spectrum, Gareth is passionate about advocating for neurodiversity in the workplace and has led grassroots programs to effect change in this area.

After his family, and perhaps the San Antonio Spurs, Gareth enjoys nothing more than connecting and collaborating with like-minded individuals to help shape the future of pensions with a view to both strengthening and broadening retirement systems.



Sally Shen
Associate Fellow

Sally Shen is currently the Manager of Risk Analytics and Models at CPP Investments. Previously, she was Research Manager at OMERS, where she led the creation of innovative and impactful research, enriching and extending the ongoing efforts concerning pension plans and social value. Before joining OMERS, Sally served as a Research Associate at Global Risk Institute, collaborating with top academics and the pension industry for research, and played a crucial role in establishing the National Pension Hub.

Sally's journey in academia included being an Assistant Professor at Capital University of Economics and Business in Beijing, China, before she moved to Canada in 2017. She earned her Ph.D. in Finance in 2015 from Maastricht University in the Netherlands and has also worked as a researcher with APG. Sally has served as an international research fellow at Netspar since 2009.

Sally's research interests focus on the social value of pensions, longevity risk, pension communication, sustainable finance and climate risk, pension risk management, asset and liability management, pension technology, strategic asset allocation, liability valuation and pension system design.

NIA - Onsite Event Staff



Jen Orenstein Events Specialist

Jen Orenstein is an accomplished Events Specialist with extensive experience in both the hospitality industry and event management. She is passionate about delivering impactful, meaningful events that help advance the NIA's mission.

Jen's career journey includes a notable tenure at Toronto Metropolitan University's Advancement Department, where she played a key role in managing and enhancing alumni and donor events. Her background in the hospitality industry further underscores her exceptional skills in creating seamless and engaging experiences.



Magdalen Stiff Director of Communications

Magdalen Stiff is the Director of Communications at the NIA. Prior to joining the NIA, Magdalen was the Assistant Director of Strategic Communications at the Ministry of Economic Development, Job Creation and Trade. Under her leadership, she led the team responsible for supporting the largest auto investment in the province's history, having worked with major investors in the electric vehicle sector. She was also the Senior Manager of Digital Strategy at the Ministry of Children, Community and Social Services, where she helped make it easier for families to access the services they needed online.

Prior to her public service work, Magdalen spent 10 years in the private healthcare sector helping healthcare professionals with their marketing and communications needs. As Marketing Manager at dentalcorp, Canada's largest network of dentists and dental practices, she helped dentists unlock their growth potential by developing localized marketing strategies.

Magdalen holds a Bachelor of Arts in Communications from the University of Ottawa. She is passionate about using her communications and marketing background to give back to her community.



Anais Diaz Lozano
Development Officer

Anais Diaz Lozano is a Development Officer at the National Institute on Ageing (NIA).

Before joining the NIA, Anais served as an Annual Giving Officer at York University, managing a diverse portfolio of prospects and supporting comprehensive cultivation, solicitation, and stewardship initiatives. She has also contributed to stewardship and donor relations programs at the Schulich School of Business and Sinai Health Foundation, strengthening relationships and enhancing philanthropic impact. Anais also worked as a Project Officer at the International Federation on Ageing.

Anais holds a BA in International Relations and History from the University of Toronto and a MA in International Relations from the University of Manchester.

ACPM



Korinne Collins Chief Executive Officer

Korinne was appointed as CEO of the Association for Canadian Pension Management (ACPM) in July 2024.

As a seasoned business leader, Korinne brings extensive experience in financial services, business growth and association management. Prior to joining ACPM, she served as VP, Education & Events at the Canadian Credit Union Association, where she led the strategy, revenue generation and execution of education, conferences and events. Korinne has also held senior leadership positions at CIBC, IBM and PwC.

Korinne is a Certified Corporate Director from the ICD with governance experience serving on several boards.

Alberta Teachers' Retirement Fund



Julie Joyal

Vice President, Pension Services

Julie Joyal is Vice President, Pension Services at the Alberta Teachers' Retirement Fund (ATRF). Julie is responsible for the strategic direction and management of the Pension Services department, overseeing the provision of pension benefits as well as services and information to plan members, employers, and plan sponsors. She advises on pension benefits, member services, and actuarial issues for the Teachers' Pension Plans in Alberta, which have over \$24 billion in assets and more than 85,000 plan members.

Prior to joining ATRF in 2016, Julie was Director, Pension and Benefits with Canada Post. Before that, she was Vice President at the global consulting firm Aon.

Julie holds a B.Sc. degree in Mathematics from the University of Montreal and is a Fellow of the Canadian Institute of Actuaries and the Society of Actuaries. Julie is a Board member of the Association of Canadian Pension Management (ACPM) and the Chair of its Alberta Regional Council.



Lilach Frenkel

Partner

Lilach is a Partner at Aon and a seasoned actuary with over 25 years of experience in the pension industry, working with various stakeholders to manage and meet risk objectives through strategy and innovation. Lilach provides strategic advice to plan sponsors, boards and pension committees on initiatives related to plan design, policy reform, funding and accounting for pension plans.

Previously, Lilach was a Director of Product Innovation at a public sector pension plan where she developed products and initiatives, opening new strategic opportunities and risk mitigation

techniques for the plan. She often speaks and writes about plan sponsor risk management and decumulation strategies, as well as member engagement as a means to drive the best outcomes.

Lilach has volunteered on numerous committees of the Canadian Institute of Actuaries, the Society of Actuaries and the Financial Services Regulatory Authority of Ontario.

Lilach is a Fellow of the Canadian Institute of Actuaries (FCIA) and a Fellow of the Society of Actuaries (FSA). She holds a degree in Actuarial Sciences from the University of Toronto.



Scott McManus

Actuary

Scott McManus is a retirement consultant and actuary at Aon in Toronto. With over 20 years of experience in human resources, risk management and consulting, Scott provides expert advice to employers, boards, and other stakeholders to help organizations achieve their goals and to deliver great retirement outcomes to Canadian households. Scott is a Fellow of the Canadian Institute of Actuaries.



David McGowan
Vice President, Strategic Asset Allocation

Dave joined BCI in 2017 and has over 25 years of experience in the pension and investment industry. He began his career as an actuary at a global consulting firm where he advised clients on a broad array of pension benefit issues, including risk management.

In his current role, Dave leads BCI's Strategic Asset Allocation team, which is responsible for recommendations to clients' asset allocation, investment research, managing BCI's product shelf, and client relationship management.

Dave received a Bachelor of Science degree in Physics from UBC. He is a Fellow of the Canadian Institute of Actuaries and Society of Actuaries and a CFA Charterholder.

BC Pension Corporation



Gillian Dabbs

Director, Pension Research and Insights

Gillian is the Director of Pension Research and Insights at BC Pension Corporation, one of the largest pension services providers in the country. As a senior strategic leader, Gillian is responsible for shaping and executing a forward-looking pension research and insights agenda that strengthens the corporation's position as a thought leader, enhances stakeholder trust, and ensures the pension plans it serves stay relevant and sustainable for the long-term.

Prior to her current role, Gillian was the Director, Pensions at the BC Financial Services Authority, leading the team that regulates the 600-plus pension plans in the province. Gillian has a law degree from the University of Edinburgh and a commerce degree from the University of Alberta.

BlackRock Canada



Sarah Butcher

Client Relationship Manager

Sarah Butcher is a Managing Director and Head of BlackRock's Americas Institutional Business (AIB) in Canada.

In her role, she is responsible for developing and executing AIB's strategy in Canada and delivering the firm's full suite of investment capabilities and solutions to our institutional clients across Canada. Sarah serves as a member on both the BlackRock AIB Executive Committee (ExCo) and BlackRock Canada's ExCo. She is also a member of BlackRock Canada's board of directors.

Prior to rejoining BlackRock in 2024, Sarah was the Head of Private Markets Distribution, Canada, at Fiera Capital. Previously, she worked at Neuberger Berman as a Senior Vice President in the Institutional Client Group and at BlackRock as a Director in the Institutional Client Business. Earlier in her career, she also worked at Mercer Investment Consulting and at Goldman, Sachs & Co.

Sarah earned a Bachelor of Commerce (BCom) in Finance from the University of British Columbia and an MBA from York University. She is also a Leslie Wong Fellow in recognition of her participation in the UBC Portfolio Management Foundation.



Colleen Davis
Chief Operating Officer

Colleen partners closely with colleagues across Canada and globally, driving connectivity, business effectiveness and revenue growth. In addition, Colleen oversees business management, risk operations and financial reporting for the region. Prior to this, Colleen led strategy for Canada.

Colleen was previously part of the UK Wealth sales team in London, responsible for building relationships with the firm's strategic global private bank clients. Colleen started her career at BlackRock on the EMEA client service management team, working with institutional clients. Prior to joining BlackRock in June 2013, Colleen was a member of the Sales and Marketing team at Fortress Investment Group in London.

Colleen completed the Legal Practice Course (LPC) and the Graduate Diploma in Law (GDL) at BPP Law School. She also has a Master of Science in Comparative Politics from the London School of Economics and a Bachelor of Arts (Honours) in Political Studies from Queen's University, Canada. Colleen is on the Global Council of 100 Women in Finance and was previously the London chair of the Education Committee.

Canada Life



Tawnya Duxbury

Assistant Vice President, Products & Solutions,
Workplace Retirement and Savings, MMSci, RPA

Tawnya Duxbury is Assistant Vice President, Products & Solutions, Workplace Retirement and Savings at Canada Life. She leads the strategy, development and management of retirement and savings products. Tawnya makes sure these programs deliver real value to employers and the people who use them.

Tawnya has led many successful teams in the retirement savings and wealth industry. With over 20 years in digital strategy, operations, client partnerships and member education, she works to improve retirement outcomes through thoughtful plan design and strong member engagement.

Tawnya cares about helping Canadians save money and stay involved in their retirement planning. She studies how people think and act when it comes to saving and keeps a close eye on market trends. She's also worked with sponsors to make their plans stronger and more helpful to members at every stage of their journey.

Tawnya holds a Master of Management Sciences from the University of Waterloo and has the Retirement Plans Associate (RPA) designation through CEBS.



Shaun Patton

Director, Compliance, Workplace Benefits and Retirement

Shaun is an experienced compliance leader with over two decades in the financial services industry. Since joining Canada Life in 2002, Shaun has held progressive roles, including Senior Customer Service Specialist and Compliance Consultant, building deep expertise in regulatory interpretation and operational risk management.

In Shaun's current role, he oversees 1B compliance strategies, ensuring adherence to evolving provincial and federal regulations. Shaun partners with business leaders to assess regulatory impacts, guide policy development, and strengthen governance frameworks throughout Canada Life.

Passionate about driving innovation in compliance, Shaun focuses on leveraging technology and data analytics to enhance risk oversight and deliver sustainable compliance solutions.

Canada Pension Plan Investment Board



Aimee Wong
Director, Fund Communications

Aimee Wong is Director, Fund Communications at CPP Investments, where she leads strategies that help Canadians better understand the CPP Fund’s role in supporting retirement security. Drawing on brand leadership roles at CPP Investments, RBC, Scotiabank and Bell Canada, she brings a practical approach to brand building, strategic marketing and audience engagement. Aimee holds an MBA from the Richard Ivey School of Business



Katie Zajner
Manager, Stakeholder Affairs

Katie joined CPP Investments in 2023 as Manager of Stakeholder Affairs in Toronto. She oversees domestic stakeholder relationships within CPP Investments, with a focus on financial literacy for Canadians.

Katie has a background in enterprise and startup technology, working for the Canadian entities of TIBCO, Uber, and Salesforce. Prior to her role at CPP Investments, she was the Head of Partnerships at C100, a not-for-profit focused on the global Canadian tech diaspora and Canadian entrepreneurship.

Katie holds a BA in Kinesiology from the University of Windsor and an MBA from Ivey Business School.

Canada-Wide Industrial Pension Plan



David Le Roy
Director, Market Engagement, CWIPP

With more than 18 years of experience promoting and communicating retirement and pension benefits, David is committed to advancing CWIPP’s mission of providing secure and predictable lifetime retirement income to its members. Working with members, employers, and unions, David helps raise awareness of the unique and innovative pension solution CWIPP offers across Canada and is a resource for all who are interested in the role CWIPP plays in retirement financial wellbeing.

David has worked extensively with stakeholders in both the public and private sectors, within government and industry, in both Canada and the United States. He holds a Bachelor of Arts from Western University and a Master of Arts from the University of Toronto.

Canadian Association of Pension Supervisory Authorities



David Bartucci

Head of Pension Operations
and Regulatory Effectiveness at the Financial
Services Regulatory Authority of Ontario

David Bartucci is the Head of Pension Operations and Regulatory Effectiveness at the Financial Services Regulatory Authority of Ontario (FSRA). He was formerly the Head of Stakeholder Relations and Special Projects and the director of policy for pensions. He also spent nearly one year with the additional responsibility as the Director in FSRA's Consumer Office. Prior to joining the Regulator in 2019, he spent more than a decade in progressively senior positions in the Ontario government.

CAAT Pension Plan



Jessica Falconer Senior Manager, Change Management Solutions

Jessica Falconer is the Senior Manager, Change Management Solutions at CAAT Pension Plan, with over 21 years of experience in the financial services industry. With a focus on communications and engagement, she supports employers and their members through the change management process as they transition to CAAT.

Jessica brings extensive experience working with clients and consultants to deliver strategies that drive member understanding and participation. She holds an Honours degree in Social Development Studies from the University of Waterloo.



Steven Paisley Director, Employer Onboarding Experience

Steven Paisley is Director, Employer Onboarding Experience at CAAT Pension Plan, where he leads the strategy and delivery of how employers and members join and engage with the Plan. He works closely with Pension Solutions leadership and operational teams to optimize onboarding, enhance service delivery, and support CAAT's continued growth.

With over 20 years of experience in the pension and retirement industry, Steven has held roles across leading Canadian and U.S. insurers and in consulting. He has advised some of Canada's largest organizations on strengthening retirement programs, improving plan design and elevating the employer and member experience.

Steven is passionate about expanding access to secure, sustainable pensions and plays a key role in advancing CAAT's mission to deliver meaningful retirement outcomes for Canadian workplaces.

He holds a Bachelor's degree in International Business from Carleton University.

CSS Pension Plan



Martin McInnis
Executive Director

Martin McInnis is the Executive Director of the Co-operative Superannuation Society (CSS) Pension Plan, one of Canada's largest and oldest defined contribution pension plans. Having spent over a decade working in the Canadian credit union system, including volunteer assignments overseas with credit unions in Mongolia and Uganda, Martin has a strong appreciation for the positive difference that co-operative enterprise makes in the lives of everyday people and their communities. He is proud to be managing the CSS Pension Plan on behalf of approximately 300 Canadian co-operative and credit union employers and over 57,000 employee members and retirees.

Martin has a wide range of experience in the areas of strategy, finance, operations, accounting, risk management and information technology. He holds a Bachelor of Commerce (Honours in Computer Science) from the University of Saskatchewan, is a Chartered Financial Analyst (CFA) charterholder and is a Chartered Professional Accountant (FCPA).



Max Bazile
Partner, Organization & Workforce Transformation

Max Bazile is a Partner in Deloitte’s Organization & Workforce Transformation practice and leads the Total Rewards offerings across Canada. He has spent over 20 years in the Reward Consulting industry, the last decade with Deloitte.

A Pension Actuary by training, Max has been a Fellow of both the Canadian Institute and the Society of Actuaries since 2011. He has a clear focus and passion on the Pension sector, where he looks to help organizations transform through optimizing across their people, processes and technology to deliver the best experience and outcomes to plan members.



Katherine Kruse
Senior Manager, Organization & Workforce Transformation

Katherine Kruse is a Senior Manager in Deloitte’s Organization & Workforce Transformation practice and has over 25 years of experience in human resources, specifically related to benefits design, implementation and retirement administration technology and consulting roles.

Katherine has led large-scale transformation efforts in the US and Canada, working with large public pension plans and other complex institutions in consulting roles covering digital transformation and platform strategy development.

Katherine is a Certified Employee Benefits Specialist (CEBS) from Dalhousie University, PMP and earned a Bachelor of Commerce degree (major – accountancy) from Concordia University, Montreal.

She specializes in working with organizations to optimize the value of the new technology to meet their strategic business goals.

Desjardins



David Charland

Regional Vice President, Québec – Business Development

David is responsible for the business development and client relationship teams for Group Retirement Savings in Québec. He provides strategic direction and supports team performance in delivering group savings solutions tailored to clients' needs. Recognized for his strategic vision and strong understanding of the market, David works closely with his teams to implement sustainable solutions aligned with organizations' objectives.

Prior to joining Desjardins, David held various roles in business development, actuarial services, and consulting, working with insurance companies and an investment consulting firm. He holds a Bachelor's degree in Actuarial Mathematics from Concordia University and is an Associate of the Society of Actuaries (ASA). He is also a member of the Canadian Institute of Actuaries (CIA).



Marie-Josée Tremblay-Turcotte

Team Leader, Group Retirement Savings Products

Marie-Josée is a seasoned actuarial professional with over 18 years of experience in group retirement savings. She is an Associate of the Society of Actuaries (ASA) and a member of the Canadian Institute of Actuaries (CIA). She has held leadership and advisory roles within large organizations, developing a strong track record in governance, complex project management, and the design of innovative, high-value solutions.

She currently serves as Team Leader, Group Retirement Savings Products, where she leads large-scale initiatives, supports team performance, and contributes to the evolution of products and practices aligned with business objectives. Known for her strategic mindset and collaborative leadership style, Marie-Josée plays a key role in achieving Desjardins' business objectives.



Jacquie Fabro

Director, Communication Consulting

Jacquie has over 20 years of strategic communication experience – planning, developing, and delivering communication campaigns, with a focus on human resources programs and employee engagement. Before joining Eckler, she was responsible for managing a practice of award-winning communication consultants in the HR industry.

Jacquie has a depth of experience crafting thoughtful communication strategies and tactical rollout plans to achieve employee buy-in and drive business results. She is dedicated to bringing fresh, innovative communication techniques to her work to drive awareness, comprehension, and action.

Jacquie has served as a project lead for dozens of high-profile communication and change management clients across a variety of industries, including manufacturing, logistics, tech, oil & gas, consumer packaged goods, and pharma. Her commitment to bringing fresh perspectives and building communication with impact has yielded several awards, including an International Association of Business Communicators (IABC) Silver Leaf Award and Benefits Canada Workplace Benefits Awards.

A graduate of the University of Ottawa, Jacquie is also certified in the Prosci change management methodology, which she brings to each communication project to drive stronger results for her clients.



Scott Thompson
Principal, Pension

Scott is a pension actuary with over 18 years of experience advising organizations across Western Canada. He joined Eckler in 2023 as the firm's first actuary in Alberta, supporting a growing client base with a wide range of retirement program needs. His consulting work spans a broad range of areas, including funding valuations, plan design, executive SERPs, governance, risk strategy, and regulatory strategy for rate-regulated utilities.

Scott has worked with plans of all sizes, from executive-only arrangements to large single-employer plans with thousands of members. He is a Fellow of both the Canadian Institute of Actuaries and the Society of Actuaries, and has also completed assignments abroad in Tokyo and São Paulo. Known for his deep technical knowledge and practical approach, Scott brings a strong understanding of pension legislation across several jurisdictions and expertise in pension accounting standards, including US GAAP, IFRS, and PSAB.

EY Canada



Uros Karadzic
Partner, People Advisory Services

Uros Karadzic is a partner based in Toronto, Canada. He is the national Leader of EY’s Reward practice and the Deputy Leader of EY’s People Advisory Services. Uros is a pension actuary with 25 years of experience.

Uros advises clients on a wide range of Total Reward and HR issues, whether in the context of mergers and acquisitions or as part of ongoing advisory services.

He leads a diverse team of actuaries, lawyers practicing in tax, pension and employment law, and compensation professionals. Together, Uros’s team delivers integrated, strategically aligned solutions to Canadian and multinational companies, governments, public sector entities, private equity firms and others.

Uros has extensive leadership involvement in the Canadian pension industry, including roles in actuarial and accounting professional bodies, industry associations, research institutes and public policy forums. He currently serves as the Presiding Partner of EY’s Canadian Partner Forum and as the Canadian representative on EY’s Global Governance Council.



Carol Wong
Partner, People Advisory Services

Carol is a pension actuary who advises clients on key financial risks and exposure areas relating to their retirement and benefits programs, incentive programs and HR policies. She offers strategic advice to pension committees and executives on strategy and execution, risk management, financial reporting, and the ongoing governance and operations of pension and benefit plans. Carol also has extensive experience in identifying and measuring HR risks and costs in M&A diligence and integration projects. She leads a team of actuaries to deliver solutions to Canadian and multinational companies, public sector entities, and private equity firms.

Fidelity Canada Institutional



Rajan Burney

Vice President, Institutional Client Management

Rajan Burney is Vice President, Institutional Client Management, at Fidelity Canada Institutional™. He leads the Canadian group responsible for the investment servicing of primarily defined benefit, defined contribution, endowment, foundation, taxable corporate asset clients, as well as banks and insurance companies.

Mr. Burney joined Fidelity as a senior fund analyst in 1999. In this role, he was responsible for communicating the Fidelity investment story to plan sponsors, conducting fund analysis, and managing the FundsNet program of external managers and funds. Prior to joining Fidelity, Mr. Burney was an analyst with SEI Investments' asset consulting practice in Toronto, where he was responsible for the analysis of pension, endowment, and foundation assets of plan sponsors and portfolios managed by primarily institutional investment managers.

Mr. Burney earned a Bachelor of Commerce in finance and international business and a master of Business Administration degree from McGill University.



Tracey Wong

Vice President, Institutional Sales and Service

Tracey Wong serves as the Vice President of Institutional Sales and Service at Fidelity Canada Institutional, where she leads the firm's institutional business in Canada across sales, consultant relations, client relations, RFP, database, and transition services. In this role, she leads the teams responsible for growing strategic relationships with plan sponsors, institutional consultants and clients to deepen relationships and enhance Fidelity's institutional presence in the Canadian market.

Bringing over 25 years of institutional investment expertise, Ms. Wong has held diverse leadership roles within Fidelity since 2006. Over the course of her career, she has built deep expertise in leading teams, developing client partnerships, and advancing the firm's presence across the institutional market. She previously chaired the Women at Work committee and was an active member of Fidelity's ESG Corporate Sustainability and Investments committees.

Ms. Wong holds a BSc from Carleton University and an MBA from Warwick University. Beyond her professional endeavors, she serves as the Chair of the Board for the Bayview Glen School and served as the Chair of the Policy and Risk Committee at the same institution.

Government of Canada



Neal Leblanc

Director of Policy and Legislation, Canada Pension Plan (CPP) at Employment and Social Development Canada (ESDC)

With over 25 years of experience in public pensions within the federal government, Neal began his career as a microsimulation developer and researcher before transitioning into program policy and legislation.

While his role has changed over time, Neal has spent his career working to ensure that the CPP remains relevant to the evolving needs of Canadians. He has played a pivotal role in supporting and developing improvements to the Plan, most notably the CPP enhancement, as well as various adjustments from Triennial Reviews and the introduction of proactive enrolment.

Neal holds a Master of Cognitive Science degree from Carleton University, as well as a Bachelor of Arts in Cognitive Science, specializing in Computation and Cognition.



Neil MacKinnon

Senior Advisor on the Pensions, Crown Financing and Currency team, Financial Sector Policy Branch, Department of Finance Canada

Neil MacKinnon is a Senior Advisor on the Pensions, Crown Financing and Currency team in the Financial Sector Policy Branch, Department of Finance Canada. The team provides policy advice and analysis respecting pension plans in federal areas of employment.

Prior to joining the team, Neil has worked in other areas of the Department, including payments policy and major federal transfers to provinces and territories. Neil holds a bachelor's degree in economics from Acadia University and a master's degree in economics from Dalhousie University.

Healthcare of Ontario Pension Plan (HOOPP)



Darryl Mabini

Assistant Vice President, Stakeholder Engagement & Research

Darryl Mabini has worked in the defined benefit (DB) pension industry for over 25 years. After starting his career in plan administration at the Ontario Teachers' Pension Plan (OTPP), he moved to the Healthcare of Ontario Pension Plan (HOOPP), where he later on started their employer and member recruitment program. HOOPP is a jointly-sponsored DB plan for Ontario's hospital and community-based healthcare sector.

In 2014, Darryl led HOOPP's foundational pension advocacy strategy aimed at raising public awareness of the value of defined benefit pension plans. Today, Darryl leads HOOPP's pension advocacy and research team, which advocates for good pensions for all Canadians through thought leadership research. His role also involves outreach to a variety of stakeholders, including members and employers, unions, pension industry experts, associations, and healthcare sector advocacy groups.



Jennifer Rook

VP of Government, Regulatory & Stakeholder Affairs

Jennifer Rook leads HOOPP's global strategies in government relations, regulatory affairs, and advocacy. She also led the development of the organization's 2030 Strategic Plan and the implementation of key strategic initiatives, including opening HOOPP's first international office in London, UK.

Previously, as Head of Pension Operations and Regulatory Effectiveness at the Financial Services Regulatory Authority of Ontario (FSRA), Jennifer oversaw the regulation and supervision of Ontario's pension sector, including plan applications, member inquiries, and compliance functions.

Jennifer's extensive background in pension policy includes her tenure as Director of the Pension Policy Branch at the Ontario Ministry of Finance, where she led the development of Ontario pension policy and significant legislative and regulatory reforms. This work included the development and implementation of Ontario's new funding framework for defined benefit pension plans and special regulations to restructure the Algoma and Stelco pension plans. Jennifer also served as Director of Policy for two Ontario Finance Ministers.

A lawyer by training, Jennifer previously practiced commercial litigation in Toronto.

La caisse de dépôt et placement du Québec



Dominic Rioux

Senior Director, Depositor Advisory Services

Since 2011, Dominic Rioux has been a member of the Depositor Advisory Services team, where he currently holds the position of Senior Director. In this capacity, he serves as a trusted advisor and primary point of contact for several institutional clients, supporting them in their strategic decision-making processes, particularly in the development of investment policies and strategic asset allocation frameworks. He also plays a key role in shaping the strategic direction of the advisory service and provides leadership in accountability processes and high-level client communications.

With more than 15 years of experience in the pension and investment sectors, Dominic specializes in the design of long-term investment strategies for pension and insurance plans. He is recognized for delivering solutions tailored to client needs and for his ability to communicate complex investment concepts to investment committees, senior management teams, and boards of directors.

Dominic holds a Bachelor's degree in Actuarial Science from Université du Québec à Montréal (UQAM) and a Master's degree in Finance from HEC Montréal. He is a Chartered Financial Analyst (CFA) and a Chartered Alternative Investment Analyst (CAIA).

Local Authorities Pension Plan (LAPP)



Darcy Atkinson

Vice President, Finance and Risk

Darcy joined the LAPP Corporation team in 2020 as the Vice President, Finance and Risk. He leads the Corporation's financial management, internal controls, enterprise risk management program, and he is a member of the senior management executive team that provides advice and support to the CEO and both LAPP Boards.

Darcy has more than 15 years of leadership experience in investments, finance, accounting, project management, business continuity, preparation of financial statements, internal audit and controls, and enterprise risk management. Before joining LAPP Corporation, he served as Chief Financial Officer and Chief Risk Officer for a large Alberta-based Employee Benefit Plan. He led the design, development, and implementation of the organization's Enterprise Risk Management program, along with being one of the first in Canada to implement IFRS 17 – Insurance Contracts.

Darcy is a Chartered Professional Accountant (CPA), and he serves as the chair of the Thought Leadership Committee of the Institute of Internal Auditors Canada. Darcy also holds a Business Administration Degree from NAIT.



Brian Mulawka

Executive Director, Stakeholder Engagement

Brian Mulawka is LAPP's Executive Director, Stakeholder Engagement and brings extensive corporate communications and stakeholder engagement experience to his role.

Brian came to LAPP from ATRE, where he managed the organization's internal and external communications during the Bill 22 transition and for five years after that. He has also served as a government policy advisor at the federal level and as a communications advisor with the Government of Alberta, in addition to spending nearly a decade running his own communications firm.

Brian is actively involved in Canada's pension industry as the co-chair of the Pension Engagement Network, which regularly gathers pension communicators from across Canada to discuss industry topics. He has completed the Executive Leadership program at Cornell University and the Mini-MBA program in communications at Rutgers Business School.



Mitch Frazer

Managing Partner, Toronto Office

Mitch is the Managing Partner of the Toronto office of Mintz and the Chancellor of Ontario Tech University. Prior to joining Mintz, Mitch served as the chair of the Pensions and Employment Practice of an international law firm based in Toronto. His practice focuses on all aspects of pension, benefits and employment law.

Mitch is the co-founder of the National Institute on Ageing at Toronto Metropolitan University, a former adjunct professor at the University of Toronto Faculty of Law and a published author. A committed philanthropist, he supports numerous educational and health-related organizations and causes.

He currently serves as chair of the North York General Board of Governors, is a member and former chair of the Toronto French School (TFS) Board of Directors and sits on the Forum Income and Impact Fund Board of Trustees. He is the past chair of Toronto Metropolitan University's Board of Governors and a former member of the Ontario Science Centre Board of Trustees.

An avid runner, Mitch has completed all seven Abbott World Marathon Majors. He was named one of the 25 most influential lawyers in Canada by Canadian Lawyer magazine and is a recipient of numerous awards and honours, including the Queen Elizabeth II Diamond Jubilee Medal, the King Charles III Coronation Medal, the Ontario Bar Association's Award of Excellence in Pension and Benefits Law, the CCAE Friend of Education Award and an Honorary Doctor of Laws from Toronto Metropolitan University. He has also been admitted to the Order of Ontario.

Northern Employment Benefits Services



Nicole Pintkowsky

Director Programs Operations

Northern Employee Benefits Services (NEBS) is a member-owned, not-for-profit corporation that sponsors an insurance and health care benefits plan and multi-employer defined benefit pension plan for public sector and not-for-profit organizations and their employees in the Northwest Territories and Nunavut.

Nicole is a benefits administrator with over 24 years of progressive experience in pension plan management and group health programs with NEBS. Currently serving as the Director of Programs Operations, Nicole plays a key role in plan operations and member services for both the health benefits plan and pension plan, and the unique challenges faced with NEBS' northern public sector clients.

Outside of work, Nicole is an avid paddler and has explored many northern rivers by canoe and local lakes by kayak, canoe, rower, and paddleboard.

Nova Scotia Pension Services Corporation



Cathy Clarke
Chief Pensions Officer

Cathy Clarke is the Chief Pensions Officer at Nova Scotia Pension Services Corporation (NS Pension), where she oversees all aspects of pension operations, including member and employer services, data management, compliance, and plan administration. She provides strategic leadership to support the effective delivery, governance, and long-term sustainability of the Public Service Superannuation Plan, the Teachers' Pension Plan, and several supplemental and legacy plans administered by NS Pension.

With more than 25 years of experience in pension administration, financial management, and client service, Cathy brings deep technical expertise and a strong member-focused perspective to her work. Prior to her appointment as Chief Pensions Officer, she led the Employer Services team, where she built a reputation for collaborative leadership, operational excellence, and a strong commitment to service quality.

Cathy works closely with the Chief Executive Officer, Board of Directors, Trustees, employers, regulators, and external advisors to support plan governance, expansion initiatives, and continuous improvement.

She holds a Master of Business Administration from Dalhousie University and a Bachelor of Commerce from Memorial University of Newfoundland.



Shawna Wilson
Senior Manager, Client Services

Shawna Wilson is Senior Manager, Client Services at Nova Scotia Pension Services Corporation (NS Pension), where she oversees all aspects of client service operations. She provides strategic leadership to support the effective service delivery to all members of the Public Service Superannuation Plan, the Teachers' Pension Plan, and several supplemental and legacy plans administered by NS Pension.

With more than 28 years of experience in pension and benefits administration, people management, and client service, Shawna brings a well-versed, thoughtful approach, along with a strong commitment to member service, team leadership, and operational efficiency.

Prior to her current role, Shawna managed several teams within NS Pension, where she developed an extensive understanding of operations, built strong collaborative relationships, and maintained a consistent focus on service excellence.

Shawna works closely with our Chief Pensions Officer, members, and external advisors to support plan governance, expansion initiatives, and continuous improvement.

Shawna has a Bachelor of Science in Psychology from Dalhousie University, Halifax and a Certificate in Human Resource Management from Saint Mary's University, Halifax.

OMERS



Kyle Lawrence

Senior Analyst, Pension Policy & Legal

Kyle Lawrence is an accomplished pension professional known for his expertise in pension calculations, internal documentation, and policy interpretation. With experience in the pension consultancy as well as multiple public pension plans, he employs a collaborative approach with a focus on continuous improvement to achieve long-lasting results which ease administrative burden and improve member and sponsor experience.

Anna Martin

Pension Policy & Legal

Anna Martin is an actuary with more than 20 years of experience working internally for pension plans as well as in pension consulting. She has spent her career focusing in the areas of pension plan design, policy, administration, systems implementations, communication, union negotiations, risk management and advising on the financing & accounting of benefit plans.

Ontario Ministry of Finance



Susan Ampleford

Assistant Deputy Minister, Pension Policy and Strategy Division, Ministry of Finance

The ADM of Pension Policy and Strategy Division is responsible for providing strategic advice and analysis to the Minister of Finance, the Government of Ontario and other ministries on pension policy and legislation. The teams provide policy advice and recommendations on pension legislation and regulations to set standards for both private and public sector plans; support the government as a sole sponsor, joint sponsor and funder of public sector pension plans; support the government's relationship with the Investment Management Corporation of Ontario (IMCO); and support the Minister's role as a co-steward of the Canada Pension Plan (CPP).

Susan is an accomplished leader in the Ontario Public Service with over 20 years of experience driving impactful policy outcomes. She is recognized for building strong, trusted relationships with key stakeholders—connections that have been instrumental to the success and performance of her teams. Prior to her current role, Susan served as Director of the Broader Public Sector Pensions Branch. She also held the position of Director, Strategic Policy, in the Office of the Budget. Earlier in her career, Susan gained progressive policy leadership experience in both line ministries and central agencies. A trusted advisor and dynamic leader, Susan brings a results-driven mindset and a passion for creating meaningful change that benefits Ontarians.

Susan holds a Master of Arts in International Affairs from Carleton University and an Honours Bachelor of Arts from the University of Toronto.



Kevin Curtin,

Director, Pension Policy Branch, Pension Policy and Strategy Division, Ministry of Finance

Kevin Curtin is the Director of the Pension Policy Branch in the Pension Policy and Strategy Division at the Ontario Ministry of Finance. The Branch is responsible for the Pension Benefits Act and its regulations, which govern pension plans in Ontario. He previously served as Acting Director with responsibility for pension policy focused on Ontario's broader public sector plans.

Kevin brings over ten years of experience in the Ontario Public Service and holds a Master of Public Policy from the University of Toronto.



Yang Qiao

Manager, Broader Public Sector Pensions Branch, Pension Policy and Strategy Division, Ministry of Finance

Yang Qiao is the Manager of the Broader Public Sector Pensions Branch in the Pension Policy and Strategy Division at the Ontario Ministry of Finance. The Branch is responsible for the legislative and regulatory framework governing Ontario's major public sector pension plans. Yang brings over 10 years of experience in the Ontario Public Service, with a strong background in pension policy, public finance, and intergovernmental affairs. Yang holds a Master of Arts in International Relations from Yale University.

Ontario Pension Board



David Au
Executive Director – Funding, Actuarial and Data Analytics

David joined OPB in June 2025, and prior to that, he spent 20 years in the Ontario Public Service in the areas of policy, fiscal planning, employee relations, and collective bargaining/negotiations. Just prior to joining OPB, David was the Assistant Deputy Minister of Employee Relations and Negotiations within the Treasury Board Secretariat.



Kate Wells
Manager, Digital Experience

Kate Wells leads the Digital Experience team at Ontario Pension Board (OPB), where she is responsible for shaping and delivering member-centric digital products and platforms. In her role, she focuses on aligning user experience, technology, and organizational strategy to simplify interactions and support service excellence. Kate brings a strong background in digital transformation and cross-functional collaboration, with a passion for building intuitive online experiences that deliver real value for members.



Jesusa Chow

SVP, Member Experience & Pension Operations

Jesusa was appointed to the Executive Team in 2023 to lead OPTrust's Member Experience and Pension Operations function, serving 118,000 members.

Jesusa joined the organization over 25 years ago and has held progressively senior client-service roles throughout her career, most recently as Vice President, Member Experience and Pension Operations. She leads a team of 70 employees who work to ensure OPTrust's members receive the pension benefits they have earned with outstanding service. She is a seasoned pension operations professional with deep expertise in customer service, coaching and mentoring, business transformation and risk management.

Jesusa holds a BA and an LLM from the University of Toronto and a certificate in pension law from Osgoode Law School.



Krisztina Palfy

Director, Member Experience

Krisztina Palfy is Director, Member Experience in OPTrust's Member Experience and Pension Operations division. In this role, she oversees the delivery of high-quality member services and supports exceptional customer service to over 118,000 members.

Krisztina has over 25 years of progressive experience in pension administration at OPTrust. She brings a strong focus on administering pension benefits and supporting member education and communication. Krisztina holds a Bachelor of Commerce from Toronto Metropolitan University and an LLM from the University of Toronto.

Plannera



Tyler Hopson

**Director, Marketing, Communications & Brand
Plannera Pensions & Benefits**

Tyler Hopson is the Director of Marketing, Communications & Brand at Plannera, responsible for corporate responsibility, member education initiatives, marketing and communications. Tyler has spent two decades in the field, including time in government relations at all levels of government, and in media relations and journalism. He gets excited exploring new pathways to solve old problems.

Tyler's previous work includes time at a multinational company in the mining sector with oversight for Indigenous Engagement across Canadian operations, helping to increase procurement from Indigenous-owned businesses by hundreds of millions of dollars over a seven-year timeframe.

Tyler has a Master of Journalism from the University of British Columbia, a Bachelor of Arts from the University of Regina, and a Certificate in P2 from the International Association of Public Participation (IAP2).

Public Service Pension Plan (PSPP)



Cheri Simpson
Pension Analyst

Cheri Simpson has more than 15 years of experience in pension administration and governance, supporting members and stakeholders across municipal, non-profit, and public service pension arrangements in Alberta. She brings a practical understanding of pension plan design and administration, including Defined Benefit and Defined Contribution plans, SERPs, Group RRSPs, and TFSAs. Currently, Cheri supports public service employees and stakeholders through the Public Service Pension Plan, focusing on governance, service delivery, administrative policy development, and enhancing member and employer experiences.



Chris Thrall
Senior Communications Advisor

Chris Thrall, PPAC, is a Senior Communications Advisor with Alberta's Public Service Pension Plan (PSPP). He brings more than 20 years of communications experience across the public and broader public sectors, including advanced education, health care, and inter-municipal initiatives. Chris specializes in using clear, effective storytelling to translate complex subjects into meaningful, accessible messages that support strategic goals, strengthen understanding, and engage diverse audiences.

Retraite Québec



Jonathan Bolduc

Director General of Supplemental Pension Plans

Jonathan Bolduc has been Director General of Supplemental Pension Plans at Retraite Québec since August 14, 2023.

As an actuary, Mr. Bolduc has developed diversified expertise in pension and benefits programs in the private sector, both in Canada and internationally. An experienced manager, he has successfully led several teams of professionals in achieving strategic objectives and is committed to promoting collaborative customer service based on trust.



Jean-François Chevarie

General Manager of public pension plans and Chief Actuary of the Quebec Pension Plan

Jean-François Chevarie is the General Manager of public pension plans at Retraite Québec and Chief Actuary of the QPP. In this capacity, he is responsible for managing and evaluating the public pension plans administered by Retraite Québec. He also manages development and research related to RRQ programs and changes within his department. In addition, he oversees the provisional administration of supplemental pension plans and the management of retirement pensions entrusted to Retraite Québec. He supervises various projects and the creation of tools for retirement financial planning. Finally, he is responsible for a team that reviews Retraite Québec's decisions in the second instance. Mr. Chevarie has some 20 years of diverse experience in the field of actuarial science.

Jean-François is recognized for his communication skills and strategic approach to public service. He is fortunate to have a diverse team of talented, motivated professionals who are committed to providing Quebecers with financially sound public pension plans.



Krista Heuston

Director, Retirement Strategist, Group Retirement Services

Krista is a Retirement Strategist within the GRS Strategy, Data and Analytics team at Sun Life. She is responsible for working with plan sponsors to understand the retirement readiness of their plan members and the overall health of their plan. In these discussions, Krista helps plan sponsors consider what actions they can take to improve member outcomes. As part of her role, Krista also supports our advocacy with governments and regulators, sharing the perspectives of plan sponsors and the practical implications of proposed legislative or regulatory changes.

Krista is a Chartered Professional Accountant, holds a Master's degree in accounting, and has over 25 years of industry experience. She has held a variety of senior roles in audit, pricing and product development.



Linda Melikian

Director, Strategic Initiatives, Group Retirement Service

Linda leads strategic initiatives at Sun Life for their Group Retirement Services (GRS) business. She has 25 years of experience in the insurance industry, having worked in various roles within GRS of other major insurance companies.

Linda holds a Master of Business Administration (MBA) from the John Molson School of Business at Concordia University and a bachelor's degree in accounting from McGill University. She is a board member of Sun Youth, a non-profit organization in Montreal that has been providing emergency services and youth development programs since 1954.

Linda lives with her husband, their two boys, and her super-energetic fox terrier, Jack. She dedicates most of her time to what she calls H&H – homework & hockey. When she's not busy helping her kids with their homework, you can find her at a freezing cold hockey arena.

T. Rowe Price



Zaheed Jiwani

Vice President, Institutional

Zaheed Jiwani, Vice President, Institutional, for T. Rowe Price (Canada), Inc., works with institutional clients and partners across the country. Zaheed has over 25 years in the Canadian institutional industry, holding a variety of senior roles in asset management and consulting. Before joining T. Rowe Price in 2023, Zaheed was a Principal at Eckler, leading their multi-asset class research and DC business. Zaheed has also held senior roles at Greystone Managed Investments and Aon Hewitt.

Zaheed earned a B.Sc. in Actuarial Science from the University of Toronto. He also has earned the Chartered Financial Analyst® (CFA) designation. In addition, Zaheed coaches youth football and has led a fundraising team for the Make-A-Wish Foundation for many years.



Sudipto Banerjee

Global Retirement Strategist

Sudipto Banerjee is a Global Retirement Strategist at T. Rowe Price. He is a Vice President of T. Rowe Price Associates, Inc. Sudipto has been with T. Rowe Price since 2018. Prior to this, he was a research associate at the Employee Benefit Research Institute in Washington, D.C.

Sudipto's research interests include investment preference, optimal plan design and post-retirement behaviour, including retirement spending, asset drawdown, health care expenses etc. Sudipto has published research in peer-reviewed academic journals such as *The Journal of Human Resources*, *Journal of Economic Behaviour and Organization*; authored numerous research briefs and whitepapers; and has been widely cited in various media publications, including *The New York Times*, *The Wall Street Journal*, *The Washington Post*, *Bloomberg Business*, *Barron's*, among others.

Sudipto has provided expert testimony at the ERISA Advisory Council at the U.S. Department of Labor, Washington DC, (2014), at California State Teachers' Retirement System (CalSTRS) Board of Trustees meeting, Sacramento, CA (2018). He earned a B.S. in economics from Presidency College, India, an M.S. in economics from the Indian Statistical Institute, and a Ph.D. in economics from The Ohio State University. He is a Series 7 registered representative.

TTC Pension Plan



Andrea May

Director, Marketing & Communications

Andrea May is a marketing and communications leader with nearly 20 years of experience in financial services, including defined benefit pensions. She leads marketing, communications, and member outreach for the TTC Pension Plan, focused on how members understand and experience their pension.

She oversees work to simplify complex information and make it easier for members to navigate and use. Drawing on experience in global CPG and regulated environments, Andrea takes a practical, member-first approach to brand, content, and communications, driving clear, consistent engagement.



Patrick Rettig

Director, Pensions and Benefits Department

Patrick is the Director of Unifor's Pension and Benefit Department. Unifor is Canada's largest private sector union, representing members in every major sector of the Canadian economy. The union is an important advocate for workplace pension plans and a retirement system that meets the needs of working people in Canada. Patrick lives in Toronto with his wife Melanie, daughter Mila and son Owen.

University Pension Plan (UPP)



Nasser Jamal
Director, Government Relations

Nasser Jamal is the Director of Government Relations at University Pension Plan Ontario (UPP), where he leads the organization’s government relations and advocacy efforts. He plays a central role in building and maintaining relationships with federal and provincial government stakeholders and facilitates enterprise-wide knowledge sharing. A skilled communicator, Nasser joined UPP in 2021 and was instrumental in developing foundational policies and operational workflows within the Communications and Engagement departments.

Prior to joining UPP, Nasser held several roles across municipal and provincial government bodies. At the City of Toronto’s Environment and Energy Division, he supported the identification of eligible projects for the City’s Green Bond Program and worked with bond purchasers to outline the City’s bond issuance framework and associated projects. He also led operational efficiency initiatives for City agencies and collaborated with the Intergovernmental Affairs Division to coordinate efforts between the Ontario and Toronto municipal governments to fund infrastructure projects.



Sean Hewitt

President and Chief Executive Officer

Sean Hewitt serves as the President and Chief Executive Officer of Vestcor. With over 20 years of progressive experience in the pension and investment industries, Sean brings a proven track record of strategic leadership.

Before joining Vestcor, Sean was the inaugural Chief Executive Officer of the Toronto Transit Commission (TTC) Pension Plan. He successfully led the transition of the plan to an independent full-service pension organization and built a senior leadership team focused on delivering exceptional member service and investment management. Earlier in his career, Sean held increasingly senior roles at Canadian Pacific Railway and Mercer Canada.

Originally from Calgary, AB, Sean earned a BA in Economics from the University of Calgary. He is a CFA charter holder and holds an ICD.D designation from the Institute of Corporate Directors. Sean is a past Chairperson of the Pension Investment Association of Canada and currently volunteers on the Board of the New Brunswick Canadian Mental Health Association and the Canadian Coalition of Good Governance's Environment and Social Committee.



Elizabeth-Anne McCleave, PPAC
Director Communications

Elizabeth-Anne (Liz) McCleave is the Director Communications at Vestcor Inc. In this role since December 2016, Liz has led the development and implementation of effective communication strategies for Vestcor and its clients, while focusing on optimization of the Corporate Communications Team through strategy and innovation.

A native of Rexton, New Brunswick, Liz completed a BBA with Honours in Finance from the University of New Brunswick. Shifting her focus to Marketing, she then completed an MBA in Marketing and Entrepreneurship. In 2009, she earned the title of Canada's Next Top Ad Executive, a national marketing communications competition. Since then, she has held communication roles in the public and private sector, including New Brunswick's Department of Tourism, Corey Nutrition Company, UNB Alumni Office, and her own consulting practice. In addition, Liz was a part-time instructor in the Centre for Arts and Technology's Event Planning and Management Program. Liz recently completed the Ivey Leadership Program at Western University's Ivey Business School.

Special Guests



Sebastien Betermier

Executive Director, International Centre for Pension Management

Sebastien Betermier is the Executive Director of the International Centre for Pension Management and an Associate Professor of Finance at the Desautels Faculty of Management at McGill University. His research focuses on the relationship between risk and return, asset allocation, sustainable finance and the design of sustainable pension systems and he teaches courses on applied investments and pension funds and retirement systems.

Professor Betermier founded and currently directs the McGill International Portfolio Challenge, the world's largest buy-side competition focused on sustainability challenges for pension funds and other institutional investors. Professor Betermier holds a PhD in Finance from the Haas School of Business at the University of California, Berkeley. His work appears in top finance journals and has been featured in *The Economist*, *The Wall Street Journal*, *The Financial Times*, and *Bloomberg*, among others. In 2017, he was named one of the World's Best 40 under 40 Business School Professors by *Poets and Quants*.



Chuck Grace

Co-Founder and Advisory Chair, Canada's Financial Wellness Lab; Professor Emeritus, Ivey Business School, Western University

Chuck Grace, CPA, is a Professor Emeritus at the Ivey Business School and a leader at Canada's Financial Wellness Lab, where he helps shape national thought leadership on financial well-being. His work focuses on redefining financial resilience through an interdisciplinary lens, integrating insights from finance, behavioural science, and systems thinking. At Ivey, Chuck serves as Program Director of the Investment Professional Leadership Program. He advances research and applied insights in household finance, with more than 50 cases published through Ivey Publishing. He collaborates closely with industry and academic partners to address emerging challenges in financial wellness.

Chuck brings more than 45 years of experience in Canada's financial services industry. As Managing Partner of Bigger Picture Solutions Inc., he advises firms on strategy and growth. He previously served as COO of Quadrus Investment Services, where he helped build the firm into one of Canada's leading mutual fund dealers.

A frequent speaker and writer, Chuck focuses on bridging research and practice to improve Canadians' financial outcomes.



Evan Howard

Pensions, Benefits & Compensation Counsel, Hicks Morley

Evan Howard recently joined the law firm Hicks Morley as Counsel in their Pension, Benefits & Compensation group. Prior to this, he was at the CAAT Pension Plan, a jointly-sponsored multi-employer pension plan with over 120,000 members, 700+ participating employers, and more than \$20B in assets. Over his 14 years at CAAT, Evan held a variety of senior executive roles - most recently, he served as Chief Pension Officer, overseeing Employer and Member Services, Communications, Policy, Legal, Public Affairs, and Office Services.

Prior to joining the CAAT Plan, Evan was a partner in the Toronto office of Norton Rose Fulbright, and before that, a partner at Osler, Hoskin & Harcourt, practicing exclusively in pension and benefits law, with a special focus on the pension and benefit issues in mergers and acquisitions and corporate restructuring. From 1998 to 2000, he practiced pensions at Freshfields in London, England.



Dr. Daniel W. Richards

Associate Professor, York University

Dr. Daniel Richards is an Associate Professor in Financial Planning at York University, where he teaches and researches personal finance and financial planning.

With a research focus on financial advice and behavioural finance, his research explores topics such as gender imbalances in the advice industry, ethics in advisor-client relationships, and the psychological factors that influence financial decision-making. Dr. Richards brings a global perspective, having published research using Canadian, UK, and Australian data contexts.



Sébastien Routhier

Actuary

Sébastien Routhier is a bilingual actuary, specialized in pension plans, with over 20 years of experience in the union, corporate, and consulting fields, having worked in Canada and the United States. Sébastien is employed by the Confédération des Syndicats Nationaux (CSN). He currently sits on the pension committee and the investment committee of the Régime de retraite des employés du gouvernement et des organismes publics (RREGOP) and on the federal Public Service Pension Advisory Committee. He is a member of the Working Party on Insurance & Pensions of the Organisation for Economic Co-operation and Development (OECD). Finally, he is an administrator of the Conseil de gestion de l'assurance parental. Before joining the CSN, Mr. Routhier worked at Domtar and Towers Watson (now WTW).

Mr. Routhier is a graduate of Concordia University and a Fellow of the Canadian Institute of Actuaries and the Society of Actuaries.
