

11TH TRANSATLANTIC CONFERENCE



PROGRAM

Wednesday, June 19 – Friday, June 21, 2019

The Sagamore Resort

110 Sagamore Road

Bolton Landing, NY 12814



mebco



THANKS TO...

The National Coordinating Committee for Multiemployer Plans, the Multi-Employer Benefit Plan Council of Canada, the European Association of Paritarian Institutions, and the World Pension Alliance are pleased to thank our sponsors for their generous support of our work.



AGENDA AT A GLANCE

Wednesday, June 19

8:00 a.m. – 9:00 a.m.

Breakfast & Registration
Dollar Island Foyer

9:00 a.m. – 9:30 a.m.

Welcome & Opening of the Day
Dollar Island West

9:30 a.m. – 11:00 a.m.

Sustainable Finance & Alternative Investments

11:00 a.m. – 11:15 a.m.

Coffee Break
Dollar Island Terrace

11:15 a.m. – 12:45 p.m.

10 Years After the Great Recession: How Have We Recovered, and What Have We Learned?

12:45 p.m. – 2:00 p.m.

Lunch
Dollar Island Terrace

2:00 p.m. – 3:30 p.m.

Addressing Pension Fund Solvency

3:30 p.m. – 5:00 p.m.

Innovation in Plan Design

5:00 p.m. – 5:15 p.m.

Close of Day

6:00 p.m. – 7:30 p.m.

Cocktail Cruise
The Morgan

7:45 p.m. – 9:30 p.m.

Dinner
Shelving Rock Terrace

Thursday, June 20

8:00 a.m. – 9:00 a.m.

Breakfast & Registration
Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Opening of the Day
Dollar Island West

9:15 a.m. – 10:45 a.m.

The Future of Healthcare: Policy Objectives in the United States, Canada, and Europe

10:45 a.m. – 11:00 a.m.

Coffee Break

11:00 a.m. – 12:40 p.m.

Mental Health in the Workplace

12:40 p.m. – 2:00 p.m.

Lunch
Dollar Island Terrace

2:00 p.m. – 3:30 p.m.

The Legalization of Marijuana

3:30 p.m. – 4:45 p.m.

Managing Societal Costs of Disability

4:45 p.m. – 5:00 p.m.

Close of Day

Friday, June 21

8:00 a.m. – 9:00 a.m.

Breakfast & Registration
Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Opening of the Day
Dollar Island West

9:15 a.m. – 11:45 a.m.

New Forms of Work / The Gig Economy

11:45 a.m. – 12:00 p.m.

Close of Conference

WEDNESDAY, JUNE 19

FOCUS ON PENSIONS

8:00 a.m. – 9:00 a.m.

Breakfast & Registration

Dollar Island Foyer

9:00 a.m. – 9:30 a.m.

Welcome & Opening of the Day

Michael Scott, NCCMP

Robert Blakely, MEBCO

Bruno Gabellieri, AEIP

Matti Leppälä, WPA

9:30 a.m. – 11:00 a.m.

Sustainable Finance & Alternative Investments

Throughout the world there is an increased focus on Environmental, Sustainable, and Governance (ESG) factors and “Green” investing in selecting and evaluating investments. This session will explore the expanded role of sustainable finance and other alternative investments including infrastructure, real estate, and private debt in the context of pension fund investing. What is required? What is permitted? What are the emerging best practices?

Keynote: Ed Smith, President and CEO, ULLICO

Keynote: Kristof Woutters, Head of Pensions & Insurance Relations, Candriam Investors Group

Panel Discussion: *Moderator* TBD

Ed Smith, President and CEO, ULLICO

Canadian Representative TBD

Kristof Woutters, Head of Pensions & Insurance Relations, Candriam Investors Group

11:00 a.m. – 11:15 a.m.

Coffee Break

11:15 a.m. – 12:45 p.m.

10 Years After the Great Recession: How Have We Recovered, and What Have We Learned?

During 2008 and 2009, pension funds suffered the greatest single year losses since the Great Depression. Have pension funds recovered? How has this changed pension fund investing? What have we learned? And what supervisory tactics are now in place as a result?

Keynote: Fiona Stewart, Lead Financial Sector Specialist, Finance, Competitiveness & Innovation, The World Bank

Keynote: John DeMairo, President and CEO, Segal Marco Advisors

Panel Discussion: *Moderator*

John DeMairo, President and CEO, Segal Marco Advisors

Susan Bird, President, McAteer Group of Companies

Gerard Riemen, Managing Director, Federation of the Dutch Pension Funds

Romain Despalins, Statistician, Organization for Economic Co-Operation and Development

12:45 p.m. – 2:00 p.m.

Lunch

Dollar Island Terrace

WEDNESDAY, JUNE 19

FOCUS ON PENSIONS

2:00 p.m. – 3:30 p.m.

Addressing Pension Fund Solvency

Last year, Congress established the Joint Select Committee on Solvency of Multiemployer Pension Plans in response to the impending insolvency of several multiemployer pension funds. While the Joint Select Committee was ultimately unable to reach consensus on a solution, the committee process highlighted the increased focus on solvency of pension funds. This session will explore the importance of how pension fund solvency is defined, how plan trustees are able to manage plan solvency, and how are pension benefits guaranteed or backstopped around the world.

Keynote: Ted Goldman, Director of Policy, Research and Analysis Department, Pension Benefit Guaranty Corporation (TBC)

Panel Discussion: *Moderato*

Ted Goldman, Director of Policy, Research and Analysis Department, Pension Benefit Guaranty Corporation (TBC)

Cameron Hunter, Principal, Pensions and Benefits, Eckler Consultants and Actuaries

Rafael Quevedo, Principal Economist-Statistician, European Central Bank

Richard Ingram, Executive Director, Teachers' Retirement System of the State of Illinois

3:30 p.m. – 5:00 p.m.

Innovation in Plan Designs

There is growing realization that sustainable benefit designs must share the risks inherent in retirement benefits more equitably between all the stakeholders in the system, and there are a wide range of approaches being developed that address this equity in different ways. This session will focus on innovative plan designs either in use or under consideration throughout the world, including target benefit design plans in Canada, as well as composite and variable annuity designs in the United States.

Keynote: Robert A. Wylie, Executive Director, South Dakota Retirement System

Keynote: David Dean, Senior Vice President, Benefits Consultant and Actuary, Segal Consulting

Panel Discussion: *Moderator: Eric Muller-Borle, Founder, Global Benefits Vision*

David Dean, Senior Vice President, Benefits Consultant and Actuary, Segal Consulting

Alex McKinnon, Head of Research, United Steel Workers

Christian Lemaire, Global Head of Retirement Solutions, Amundi

The Hon. Nicholas Sherry, Chair, Household Capital

Sandy Matheson, Executive Director, Maine Public Employees Retirement System

5:00 p.m. – 5:15 p.m.

Close of Day

Michael Scott, NCCMP

Matti Lepalla, WPA

6:00 p.m. – 7:30 p.m.

Cocktail Cruise Aboard the Morgan

Please join us for cocktails aboard The Morgan, a replica 19th-century touring vessel, for a cocktail cruise around Lake George generously sponsored by ULLICO. The Morgan will depart from the dock behind the Fitness Center promptly at 6:00

7:45 p.m. – 9:30 p.m.

Dinner

Please join us for dinner generously sponsored by ULLICO on the Shelving Rock Terrace following the cruise.



WEDNESDAY, JUNE 19
FOCUS ON PENSIONS



I N S U R A N C E | I N V E S T M E N T S

THURSDAY, JUNE 20

FOCUS ON HEALTHCARE

8:00 a.m. – 9:00 a.m.

Breakfast & Registration

Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Welcome & Opening of the Day

Michael Scott, NCCMP

9:15 a.m. – 10:45 a.m.

The Future of Healthcare: Policy Objectives in the United States, Canada, and Europe

Speakers will consider the most pressing healthcare policy questions in their national debate, as well as the broader implications of the outcomes.

Keynote: Carolyn Smith, Counsel, Alston & Bird LLP

Keynote: CIHI Rep

Keynote: Dejan Malesic, Head of Business Development-International Pensions - Insurance Department, Pervinet Outsourcing Solution

10:45 a.m. – 11:00 a.m.

Coffee Break

11:00 a.m. – 12:40 p.m.

Mental Health in the Workplace

Speakers will discuss trends in mental health coverage and policy in their national debate, as well as recent policy trends and the main challenges in each region.

Keynote: Pamela Greenberg, President and CEO, Association for Behavioral Health and Wellness

Keynote: Joseph Riciutti, President and CEO, SEB Benefits & HR Consulting

Keynote: PSYA – not confirmed

Keynote: Paul E. ter Wal, CSP FPSA, Stentor & Team Andare

12:40 p.m. – 2:00 p.m.

Lunch

2:00 p.m. – 3:30 p.m.

The Legalization of Marijuana

U.S. Issue: State legalization vs federal illegality. What does legalization mean for plan participants? Are there concerns about plan participants rights? Social/policy/legal approaches; intoxication on the worksite; medical marijuana.

Keynote: Ronald Pink, Q.C. Pink Larkin (TBC)

Panel Discussion: *Moderator: TBD*

Ronald Pink, Q.C. Pink Larkin (TBC)

Robert Blakely, President, MEBCO

Paul ter Wal, CSP, FPSA

THURSDAY, JUNE 20

FOCUS ON HEALTHCARE

3:30 p.m. – 4:45 p.m.

Managing Societal Costs of Disability

This session will consider the holistic approach to managing the societal costs of disability currently underway in Finland, as well as the various other approaches to disability throughout the world.

Keynote: Jaakko Kiander, CFO, Ilmarinen; Finish Alliance of Pension Funds

Panel Discussion: *Moderator: TBD*

Kathy Bakich, Senior Vice President and National Director Health Care Compliance, Segal Group

Eric Egan, ManuLife

Jaakko Kiander, CFO, Ilmarinen; Finish Alliance of Pension Funds

4:45 p.m. – 5:00 p.m.

Close of Day

Michael Scott, NCCMP

8:30 p.m. – 9:30 p.m.

S'Mores by the Campfire



FRIDAY, JUNE 21

FOCUS ON COLLECTIVE BARGAINING

8:00 a.m. – 9:00 a.m.

Breakfast & Registration

Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Welcome & Opening of the Day

Michael Scott, NCCMP

9:15 a.m. – 11:45 a.m.

New Forms of Work / The Gig Economy

European Commission Study. What is work? Additional and alternative bargaining “fight for \$15”, etc. How are gig and part time workers included in collective bargaining? What innovations in providing pension and healthcare benefits?

Keynote: Matti Leppälä, Secretary General and CEO, PensionsEurope and Chair, WPA

Keynote: Dan Doonan, Executive Director, National Institute on Retirement Security

Keynote: Bernd Merz, BG BAU Germany & International Social Security Association “Reforming the social model to address challenges of the new labor market trends. Current political debates in Germany.”

Panel Discussion: *Moderator: TBD*

TBD

Shawn Haggerty, President, UFCW Local 175

Werner Beulen, Construction Policy Secretary, The European Federation of Building and Woodworkers

Domenico Campogrande, Director Social Affairs, European Construction Industry Federation

Dana Schäfer, SOKA BAU

Closing Statement: Walter Sailer, SOKA BAU

11:45 a.m. – 12:00 p.m.

Close of Conference

Michael Scott, NCCMP

Robert Blakely, MEBCO

Michel Dieu, AEIP

SPEAKER BIOS



Kathryn Bakich, JD

Senior Vice President and National Director, Health Care Compliance
The Segal Group
Washington, DC

Ms. Bakich is a Senior Vice President in Segal's Washington, DC office with over 20 years' experience in health care compliance. She is the firm's National Health Compliance Practice Leader.

Ms. Bakich is one of the country's leading experts on employer sponsored health coverage. She specializes in providing research and analysis on federal laws and regulations affecting health coverage, including ERISA, Medicare, HIPAA, COBRA, the Newborns' and Mothers' Health Protection Act, the Mental Health Parity Act, and the Women's Health and Cancer Rights Act.



Susan Bird, CEBS, Fellow ISCEBS, HIA, ICD.D

President, The McAteer Group of Companies

In her day-job Susan is the president of The McAteer Group of Companies with offices in Alberta and Ontario Canada. Levering a career of 30 years she provides advanced governance and consulting services to trustees governing multi-employer welfare and pension trust funds.

In May 2017 Ms. Bird was elected as Chair of the World Pension Alliance a global organization that represents the interests of over 400 million pension plan participants and USD \$7 trillion in assets. Susan is a director of MEBCO – the Multi-Employer Benefit Council of Canada – an organization that lobbies governments on issues impacting multi-employer health and pension plans.

She is a Past Chair of the International Foundation of Employee Benefit Plans (IF) Canadian Board, Canadian Investment/Corporate Committee, Canadian Education Committee and Canadian Trustee Education Committee and Strategic Planning Committee. She has been involved in the development of education programs geared towards new and experienced trustees to help them improve overall governance. She is a speaker at the Osgoode Hall Law School pension law program.

Susan participated in two Canadian Association of Pension Supervisory Authorities (CAPSA) Industry Task Forces on Pension Plan Governance. She is the immediate past-Chair of the Financial Services Commission of Ontario (FSCO) advisory panel on multi-employer pension plan issues.

She is a graduate of the University of Toronto Rotman School of Management Institute of Corporate Directors achieving its ICD.D designation and is a chartered director. She graduated from York University with a Bachelor of Arts degree, majoring in economics.

As a volunteer, and departure from pensions and health benefits, Susan is a Director of the York Region Children's Aid Society and chairs its risk management committee.



David Dean

Senior Vice President, Benefits
Consultant and Actuary
Segal Consulting
Chicago, IL

Mr. Dean is a Senior Vice President, Benefits Consultant and Actuary in Segal's Chicago office with extensive experience in actuarial consulting. As the firm's Multiemployer Retirement Practice Leader, he leads strategic planning initiatives for multiemployer services and product and service development. Mr. Dean provides actuarial and consulting services to a number of pension and health clients and leads the Chicago office's Compliance Practice for pension and health clients. Mr. Dean has specialized expertise with all facets of multiemployer consulting, including plan design, mergers, funding projections, withdrawal liability, and issues involving the Pension Protection Act of 2006 (PPA'06) and the Affordable Care Act of 2010 (ACA). He serves as a major resource for Segal's multiemployer pension fund clients in regards to strategic planning for future funding under PPA'06 and plan design under the ACA. Mr. Dean received a BA in Mathematics from the University of Minnesota. He is a Member of the American Academy of Actuaries and an Enrolled Actuary. Mr. Dean also holds Life and Health Licenses from various states, including the State of Illinois.



John DeMairo

President and Chief Executive
Officer
Segal Marco Advisors
New York NY

Mr. DeMairo is the President and Chief Executive Officer of Segal Marco Advisors and has extensive investment consulting experience. He organizes and leads the firm, including strategic planning and resource allocation. Mr. DeMairo is located in the firm's New York office and also serves as Vice Chairman on the Board of Directors for The Segal Group.

In addition to his management responsibilities, Mr. DeMairo has extensive investment consulting experience and serves as lead

investment consultant to several major multiemployer, public and corporate plan sponsor clients. He provides services to defined benefit, defined contribution and other types of investment programs with expertise in the development of asset allocation policy, analysis of investment strategies, the selection of investment managers and the measurement and evaluation of investment performance.

Mr. DeMairo is a *magna cum laude* graduate of St. John's University, where he received a BS in Quantitative Analysis and an MBA in Finance. Mr. DeMairo is a member of the Investment Management Consultants Association (IMCA) and the International Foundation of Employee Benefit Plans (IFEBC). He is a regular participant in the American Federation of Labor and Congress of Industrial Organizations' (AFL-CIO) Investment Consultant Advisory Board.



Dan Doonan
Executive Director
National Institute on Retirement
Security
Washington, DC

In March 2019, Dan Doonan was named executive director of the National Institute on Retirement Security. With the Board of Directors, Doonan leads the

organization's strategic planning, retirement research and education initiatives.

With more than 20 years of experience, Doonan began his career at the Department of Labor as a mathematical statistician. He then spent seven years performing actuarial analysis with Buck Consultants in their retirement practice. His experience also includes positions as a research director and labor economist.

He comes to NIRS after serving as a senior pension specialist with the National Education Association. There he co-authored Characteristics of Large Public Education Pension Plans, a detailed report this is considered to be a definitive resource of information about large public education retirement plans.

Doonan holds a B.S. in Mathematics from Elizabethtown College.



Pamela Greenberg, MPP
President and CEO
Association for Behavioral Health
and Wellness

Pamela Greenberg joined ABHW as the Executive Director in 1998. Ms. Greenberg serves on the Editorial Board of the Bloomberg BNA Health Insurance Report and she is a liaison to the National Committee for

Quality Assurance Standards Committee. In 2015, Ms. Greenberg joined the Advisory Board of Landmark Health a

company that provides home-based medical care to individuals with multiple chronic conditions and in 2017 she joined InnovaTel Telepsychiatry's Strategic Advisory Board.

Ms. Greenberg was the Chair of the Coalition for Fairness in Mental Illness Coverage, one of the leading Coalitions that helped develop, advocate for, and get the Wellstone-Domenici Mental Health Parity and Addiction Equity Act of 2008 signed in to law. Additionally, Pamela served as President of ACMHA: The College for Behavioral Health Leadership. Prior to joining ABHW Pamela was the Deputy Director of Federal Affairs for America's Health Insurance Plans (AHIP) and previously served as a Legislative Assistant at Capitol Associates in Washington, D.C.

Pamela has a B.A. from Mount Holyoke College and a Masters in Public Policy from Georgetown University.



Shawn Haggerty
President
Local 175, United Food &
Commercial Workers (UFCW)

Shawn Haggerty has been President of Local 175 of the United Food & Commercial Workers (UFCW) union since November 2007. The local represents more than 70,000 unionized workers across many

sectors of the economy in Ontario. Since he became President, the Local Union has grown from about 50,000 to 70,000 through mergers and a consistent focus on organizing.

Shawn first gained exposure to Unions as a member of UFCW Local 416P while working as an electrician in the maintenance department at Robin Hood Multi-Foods in Port Colborne. He became the President of that Local and was also the Secretary-Treasurer for UFCW Local 617P until its merger with Local 175 in the year 2000.

Following the merger, Shawn worked as a Union Representative, and then became North West Regional Director in 2003. In 2005, he was appointed as an Executive Assistant, and in 2006, the Local 175 Executive Board elected Shawn to be Secretary-Treasurer. In the fall of 2007, he was elected President.

In addition to his responsibilities as President of UFCW Local 175 for the past 11 years, Shawn is also an UFCW International Vice President. Moreover, Shawn sits as a Trustee on several benefit plan boards and also serves on the Labour-Management Committee for the Ontario Ministry of Labour.

SPEAKER BIOS



Hugh C. Hart, GBA
Vice President, Sales and Account Management
NexgenRx
Toronto, Ontario

Mr. Hart is the Vice President, Sales and Account Management for NexgenRx, a technology solutions provider to the Multi-employer community. He has worked in the group benefits industry for 29 years, and, since 2005, has focused exclusively on the health and welfare trust fund segment of the group insurance marketplace. Mr. Hart's experience includes roles in group underwriting, sales and consulting. Prior to joining NexgenRx, he was a Director of Sales and Account Management with Manulife and was the National Practice leader of that firm's Health and Welfare Trust Fund business in Canada. Currently, Mr. Hart also serves as an advisory director on the MEBCO board of directors (since 2015) in addition to his responsibilities with NexgenRx. He is a graduate of the University of Notre Dame and holds the GBA designation from the CEBS® program, jointly sponsored by the International Foundation and Dalhousie University. Mr. Hart has been a speaker for both MEBCO and The International Foundation.



Cameron Hunter, FCIA, FSA
Principal, Eckler Ltd.

Cameron joined Eckler Ltd. in 1994. He is a Principal of the firm with more than 25 years of experience as an employee benefit plan consultant.

Cameron specializes in consulting to multi-employer pension and benefits plans, and leads Eckler's Trusteed Plans group. He is responsible for a number of the firm's major employee benefits clients and, along with members of Eckler's Trusteed Plans team, provides consulting advice to a range of trades – including electricians, ironworkers, operating engineers, plumbers/pipefitters, carpenters, rodmen, sheet metal workers, elevator workers, steelworkers, machinists, drywallers, graphic communication workers, millwrights and the education sector workers.

He consults on pension and benefits matters to many different employee groups, including those in the construction and education sectors, university employees (both faculty and non-faculty), and manufacturing and airline industries. He is currently an advisor to labour at three universities as they develop a multi-employer jointly sponsored pension plan.

Cameron advises a number of employee life and health trusts (ELHTs) and assisted both CUPE and the Principals' and Vice-

Principals' associations in their negotiations with the Ontario government on agreements to establish ELHTs. These ELHTs transfer responsibility for providing employee benefits from the school boards to the trusts. He continues to advise these organizations on plan design considerations and the operations of their ELHTs.

Cameron is active in the profession and in the pension and benefits industry. He has published articles on pension issues and is a regular speaker on pensions and benefits related topics. He has served on a number of professional committees for the Society of Actuaries and Canadian Institute of Actuaries; on the Fellowship Admissions Course Management Committee; and on the CIA's Education and Examination Committee, which he chaired in 2000. He was also a member of the CIA Task Force reviewing actuarial reports of multi-employer pension plans. He is a recipient of the CIA's silver award for service to the profession.

Cameron is currently a director and vice-president of the Multi-Employer Benefit Plans Council of Canada, and he is a former member of the Financial Services Commission of Ontario's Actuarial Advisory Committee. He has served on the CAPSA Investment Policy Committee's Industry Advisory Group, Model Law Committee, and Prudent Investment and Funding Committee's Industry Advisory Group.

Cameron was a member of the group that lobbied the Ontario government to adopt more appropriate funding requirements for multi-employer pension plans – including eliminating solvency funding for these unique plans. Recently, he was a witness to the Senate Legal and Constitutional Committee and the House of Commons Standing Committee on Finance with respect to the impact of Bill C-377 on pension and benefits plans. In 2014, he was a witness to the Standing Committee on Alberta's Economic Future with respect to the impact of Bill 10 on multi-employer pension plans.

Cameron is a graduate from the honours actuarial science program at the University of Western Ontario, and a Fellow of the Canadian Institute of Actuaries and the Society of Actuaries



Alex D. McKinnon
Research Director
United Steelworkers
Canadian National Office
Toronto, Ontario

Alex McKinnon, CEBS is the Research Director for the United Steelworkers Union – Canadian National Office. He has been on staff with the Union for 32 years

In 1991, he became the first rank and file member to go into the Unions National Office Research Department and in 2013 became the first rank and file member to be promoted to the Research Director.

Mr. McKinnon serves as a pension trustee on the multi-employer Steelworkers Pension Plan, as well as Chair of the Canadian Energy and Related Industries Pension Plan (CERI).

Mr. McKinnon is the Vice-Chair and past Chair and Vice-Chair of the University of Toronto Pension Plan; Secretary Treasurer of MEBCO and Chair of the Financial Services Commission of Ontario (FSCO) Multi-Employer Pension Committee. He also serves as a Labour Co-Chair of the Ontario University Pension Project (UPP)

Mr. McKinnon is a graduate of Sir Wilfred Laurier University with a Bachelors' in Economics, as well as holding the CEBS designation and a variety of certifications in pension fund governance.

Mr. McKinnon volunteers as a spinal cord peer support and in 2018 was awarded the Peer Support Volunteer of the Year. Recently, he has been appointed to the Board of Directors of Spinal Cord Injury Ontario, and also serves on the Finance Committee



Joseph Ricciuti

Co-Founder Mental Health International

And President and CEO

SEB-Benefits and HR Consulting

Joseph is the Co-Founder of Mental Health International and the President and CEO of SEB-Benefits and HR Consulting. He has over 37 years of experience as an insurance executive and management consultant with a wealth of knowledge in the Canadian healthcare industry. He has successfully advised many large Canadian and international employers, in both the public and private sectors, with their mental health, work and productivity strategies.

Joseph has written and contributed mental health and productivity research reports for publication and is often asked to speak at business and industry conferences on the subject of mental health in the workplace. He played a major role in helping to authenticate mental health as a bona fide business issue through Watson Wyatt's Stay@Work surveys and co-authored a major research study: 'A Literature Review and Gap Analysis Report: Mental Health in the Labour Force', on behalf of the Canadian Insurance Industry and the Canadian Institutes for Healthcare Research. He recently published an international report with Bill Wilkerson and the Honourable Michael Wilson: Breaking Through: Brain Health in a Brain Based Economy.

Joseph was part of the original group of professional leaders whose vision in 2009 led to the 2012 National Standard of Canada on Psychological Health and Safety in the workplace. He is one of two recipients of the prestigious award of merit presented by the Global Business and Economic Roundtable on

Addiction and Mental Health at its US/Canada Forum on Mental Health and Productivity. Patrons of the Forum were the Honourable Michael Wilson, Canada's Ambassador to the US and the Honourable David Wilkins, US Ambassador to Canada. The other recipient of this award was the world famous epidemiologist Dr. Ronald Kessler of the Harvard Medical School.

Prior to co-founding Mental Health International with the company's Executive Chairman, Bill Wilkerson, Joseph was the Managing Director, Buck Consultants Canada, the National Practice Leader, Health and Benefits at Watson Wyatt Canada and SVP Benefits Division, Canada Life. Joseph holds an honours bachelor of commerce degree from McMaster University.

He currently sits on the Board of Directors of Mental Health International and on the Foundation Board of Ontario Shores Centre for Mental Health Sciences.

Mental Health International is a not for profit organization. Its objectives are to act as an aggregator across international borders, as necessary, to help organizations assemble the appropriate resources to address mental health and productivity issues in their workplaces. It also serves to unify data, ideas and, leaders in business and science to promote and protect the mental health of working populations.

SEB Benefits and HR Consulting provides advisory services focused on workplace mental health strategies.



Michael Scott

Executive Director
NCCMP
Washington, DC

Michael D. Scott is the Executive Director for the National Coordinating Committee for Multiemployer Plans (NCCMP). He has broad investment banking, advisory and public policy experience from serving in senior positions in the U.S. Government and the private sector.

Prior to NCCMP, Mr. Scott ran his own advisory business where he advised clients on federal credit, infrastructure, federal budget issues, public-private solutions, legislation and regulations, as well as GSE and housing finance reform.

At U.S. Department of the Treasury, Mr. Scott was responsible for federal credit, federal and private sector restructurings, privatizations, infrastructure finance, and government financial policy.

Mr. Scott served as Senior Adviser to U.S. Securities and Exchange Commission (SEC) Chairman Chris Cox and Mary Schapiro during the financial market crisis. He was the senior SEC official responsible for the Chairman's role on the Financial Stability Oversight Board and the Federal Housing Finance Oversight Board.

SPEAKER BIOS

In the private sector, Mr. Scott led the U.S. Government investment banking businesses at Banc of America Securities and Miller Buckfire & Co., LLC.

Mr. Scott is a member of the CFA Institute and the CFA Society North Carolina. He holds an MBA in finance from Boston College and a BSBA in finance from The Ohio State University.



Carolyn Smith

Counsel

Alston & Bird LLP

Carolyn Smith is Counsel with Alston & Bird LLP. Carolyn brings to her practice a unique blend of policy and legal expertise. She has 20 years of experience with the

Congressional Joint Committee on Taxation, where she was the Associate Deputy Chief of Staff. While with the Joint Committee she counseled members and staff on the House Ways and Means and Senate Finance Committees and worked closely with various regulatory agencies, including the Department of Treasury and the Department of Labor. She uses her substantive background and in-depth experience in regulatory and legislative policy and process to provide her clients with strategic planning, advocacy, and compliance advice on complex tax, health, and employee benefits issues.



Edward Smith

President and Chief Executive

Officer

Ullico, Inc.

Washington, DC

Edward M. Smith is the President and CEO of Ullico Inc. Founded in 1927, Ullico Inc. provides insurance

and financial solutions for labor unions, union employers, union benefit funds, and union members.

Before joining Ullico, Smith had a long and distinguished career at the Laborers' International Union of North America. After joining LiUNA at age 13, he was elected Business Manager of Laborer's Local 773 at age 21. Smith later became International Union Vice President and Midwest Regional Manager serving over 58,000 members. He also served as Assistant to the General President.

Smith formerly served as Chairman of the Illinois State Board of Investment, Chairman of the National Alliance for Fair Contracting, and a member of the Illinois Department of Labor Advisory Board.

Smith was the first member of the Laborers International Union (LiUNA) to graduate from the National Labor College with a bachelor's degree. Smith went on to graduate from the Harvard University Trade Union Program.

GETTING HERE

The Sagamore Resort is located at 110 Sagamore Rd, Bolton Landing, NY on Lake George in the Adirondack Mountains of New York State.

The Sagamore is an easy drive from both the Albany International Airport (ALB) and the Albany/Rensselaer Amtrak station on the Empire Service Line from New York Pennsylvania Station.

Taxi service, Uber, Lyft, and car rentals are available at the airport and train station.

Transportation may also be arranged by calling The Sagamore Resort Transportation Manager directly at 518-743-6018.



THINGS TO DO

We hope that you are able to take some time before or after the conference to enjoy the numerous amenities available at The Sagamore Resort, and in the surrounding Lake George and Adirondack Park area.



- Top-tier golf course with breathtaking views of Lake George and the Adirondack Mountains (518.743.6380 for tee times)

- Hiking in Adirondack State Park
- Bocce
- Horseshoes
- Tennis (Reservations recommended)
- Museums



- Boating, Fishing, and Waterfront Activities
- Wineries and Breweries
- And more...

Visit www.visitadirondacks.com or www.visitlakegeorge.com for more ideas!

ON LAKE GEORGE • BOLTON LANDING, NEW YORK

1 Caldwell's

- 2 La Bella Vita
- 3 Mister Brown's Pub
- 4 Veranda Terraces
- 5 The LakeHouse
- 6 The Pavilion
- 7 The Club Grill Steakhouse



TO THE SAGAMORE GOLF COURSE and CLUB GRILL STEAKHOUSE

turn left off Sagamore Road onto
Route 9N South
Go 100 yards and right onto Horicon Ave
Go straight 2 miles, turn left at
Entrance to The Sagamore Golf Course
Free Shuttle Service Available

