



WORLD PENSION ALLIANCE TRANSATLANTIC PARTNERSHIP

Annual conference 2021

SPEAKERS

Session 1

HOW ARE PENSION FUNDS ADAPTING IN THE PANDEMIC ENVIRONMENT?



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The Conference moderator **ERIC MÜLLER-BORLE** founded Global Benefits Vision magazine and is its editor and CEO. Earlier, he had founded Aquamarine Consulting, a boutique management consultancy providing strategic and operational advice on their global employee benefit activities to insurance companies, reinsurers, paritarian institutions, investment banks, brokers and others.

He also currently serves as independent non-executive director of a group life insurance company, a mutual insurer, an asset management firm, and several captive reinsurers belonging to large industrial groups.

He was previously CFO of several AXA divisions and the first CEO of the MAXIS global employee benefits network, an AXA– MetLife joint venture.

Mr Müller-Borle has an MSc from HEC Paris business school and is a CFA charterholder. He serves as Regional President of the French Navy (Reserve) Officers Association and is a member of the United States Naval Institute.



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PABLO ANTOLIN is Principal Economist, Head of the Private Pensions Unit and Deputy Head of the OECD Financial Affairs Division. He manages the research and policy programme of the OECD Working Party on Private Pensions - WPPP, a body that brings together policymakers, regulators and the private sector of almost 40 countries around the world. His work covers issues related to the operation and regulation of funded retirement income systems.

The WPPP work aims at providing policy makers with policy guidelines to improve retirement outcomes. It focuses on the design of funded pension systems, its contribution to retirement income adequacy, and the regulatory framework. The work includes collecting and disseminating standardised pension fund statistics, the OECD Core Principles of Private Pension Regulation, and the OECD Roadmap for the Good Design of DC Pension Plans. The main publications are the OECD Pensions Outlook, Pension Markets in Focus and Pension Reviews and monographs on specific retirement issues.

Mr. Antolín has a PhD in Economics from the University of Oxford and an undergraduate degree in Economics from the University of Alicante (Spain).



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LIAM KENNEDY is the Editorial Director of Investment & Pensions Europe (IPE) magazine. He has over 20 years' experience as a financial journalist and editor, specializing in the field of institutional investment and pension funds. He is also a regular speaker/moderator at industry events around the world. Prior to joining IPE in 2007, Liam spent nearly seven years at the Financial Times group in London, where he worked as a specialist editor and writer and launched four European pension and investment publications. He holds an MA (Hons) undergraduate degree from the University of Glasgow, UK. He is also deputy chairman of the advisory board of INSTICUBE GmbH, the pan-European pension asset management research platform, and a trustee director of the Pensions Scholarship Trust.

IPE is the leading European institutional investment publication, with a more than 20 year, award-winning track record of thoughtful and incisive reporting and analysis of institutional investor practice, asset classes, regulation and industry data. IPE was the CFA Society of the UK's 2018 publication of the year and Willis Towers Watson's 2018 pensions publication of the year.



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Researching and managing workplace pensions is the main theme in the whole career of **PHILIP NEYT**, be it as an academic, a consultant, a pension fund manager, a corporate professional or an independent expert in different boards and commissions.

The last 15 years, Philip Neyt has been active in senior corporate functions where he dealt with pensions from a corporate perspective. Today Mr. Neyt combines different functions including as the President of the European Association of Paritarian Institutions (AEIP) and chairman of PensioPlus, the Belgian association of Pension Funds. He is also a member of the Occupational Pensions Stakeholder Group (OPSG) of EIOPA, representing Institutions of Occupational Retirement Provision (IORPs).



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GUILLERMO ARTHUR is a lawyer and a law graduate from the Pontificia Universidad Católica de Chile, specializing in labor and social security areas. He is Former Minister of Labor and Social Welfare, Former President of the Chilean Association of Pension Fund Administrators and Former Director of Banco Santander Chile.

He is currently President of the International Federation of Pension Fund Administrators (FIAP) and Vice President of AFP Capital of Grupo SURA. He is also a member of the Board of Directors of the International Labour Organization (ILO), of the Executive Council of the International Organization of Employers (IOE) and of the Labor Commission of the Confederation of Production and Commerce of Chile.

He is the Author of the book "Legal Regime of the New Pension System" Editorial Jurídica de Chile, 1999.



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MONTE TARBOX has served as the Executive Director, Investments for the National Electrical Benefit Fund (NEBF) since 2013. NEBF has 500,000 participants, 9,000 contributing employers and assets of \$17 billion. Prior to NEBF, Monte was CIO at the IAM National Pension Fund. Previous experience included senior positions with investment consulting firms in Chicago, Washington, and Melbourne, Australia.

Monte has a BA from Carleton College and an MBA from the University of Chicago. He served for 16 years on the Board of Investments for the Montgomery County Public Schools Retirement System in Rockville, MD. In 2018, he was appointed as a Public Advisor to the Maryland State Retirement and Pension System.



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ALEX D. MCKINNON is the Research Director for the United Steelworkers Union (USW), Canadian National Office. He has worked on staff with the Union for over 33 years. Alex was the first rank and file member hired to the USW's National Office Research Department and, in 2013, became the first rank and file member to be promoted to the Research Director. Prior to that he was a millwright at the basic steel plant - Stelco LEW.

Alex serves as a pension trustee on the new \$11B University Pension Plan (UPP), as well as a trustee on the multi-employer Steelworkers Pension Plan, and is Chair of the Canadian Energy and Related Industries Pension Plan (CERi). He also serves as a Trustee on a large multi-employer health and welfare benefit plan and on various committees for the Ontario Financial Services Regulatory Authority, including the Stakeholders Advisory Group and the Multi-Employer Pension Plan Committee as well as a joint provincial federal committee on defined contribution plans.

Alex is the past Vice-Chair and Chair of the University of Toronto Pension Plan and President of Multi-Employer Benefit Plan Council of Canada (MEBCO). Alex earned a bachelor's degree (Economics) from Sir Wilfred Laurier University and holds the Certified Employee Benefit Specialist (CEBS) designation.

Alex also serves as a spinal cord peer support volunteer and was appointed to the Board of Directors of Spinal Cord Injury Ontario in 2018, where he serves as Treasurer and sits on the Governance Committee.



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Session 2

SUSTAINABLE FINANCE: THE ROLE OF PENSION FUNDS



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SIRPA PIETIKÄINEN is a member of the European People's Party (EPP) in the European Parliament. She is a former Minister of the Environment in Finland (1991-1995), and a Member of the parliament from 1983 to 2003 and Member of the European Parliament since 2008.

At the European Parliament, Ms Pietikäinen is a member of the Economic and Monetary Affairs Committee and a substitute member of the Environment, Public Health and Food Safety Committee. Within her work, she seeks to combine her two specialities, that of environment and economics. Ms Pietikäinen is a strong advocate of a transition to a circular economy and sustainable finance and served as the lead negotiator on behalf of European Parliament and the EPP group on the first Sustainable Finances legislative initiatives, Disclosure and Taxonomy Regulations as well as on the Parliament's Own Initiative Report on Sustainable Finance.

A graduate from the Helsinki School of Economics, Ms Pietikäinen holds MSc in Business, and has been teaching university courses on negotiations theory and practices. She is active in several organisations, her positions of trust including Chairmanship of the Globe EU.



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FIONA REYNOLDS is the CEO of the Principles for Responsible Investment (PRI). The PRI is a UN supported organization, with over 3,500 signatories who collectively represent over US \$100 trillion in AUM. She has been responsible for the PRI's global operations since 2013.

Fiona was named one of the 20 most influential people in sustainability globally by Barron's magazine and has twice been named one of Australia's one hundred women of influence by the Australian Financial Review.





MATTI LEPPÄLÄ is the Secretary General and CEO of PensionsEurope.

PensionsEurope is the leading voice for funded pensions in Europe representing 24 European national pension fund associations covering pensions of more than 110 million Europeans and close to € 5 trillion of assets.

Matti is a member of the Occupational Pensions Stakeholder Group of EIOPA and he has been the Chair and Vice-Chair of the OPSG in 2013-2018. He was a member of the European Commission's High-Level Group of Experts on Pensions 2018 - 2019. Matti has been the Chair of the World Pension Alliance 2018 – 2019.

Prior to joining PensionsEurope in 2011 Matti worked for 11 years for The Finnish Pension Alliance being responsible for EU and international affairs as well as investment policy and legal issues. In the 1990's Matti worked for the Finnish trade unions in collective bargaining, labor law and social policy. During that time he was a member of the Board of pension insurance company Veritas. In 1986 Matti started his professional career at the Law Drafting Department of the Ministry of Justice in Finland.

Matti has a LLM and an Executive MBA in Insurance and Financial services



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THEO LANGEJAN has had a long career within the Public Service before joining the private sector as a consultant. In the Public Service Theo Langejan has, as a Director General in the Ministry for Social Affairs, been responsible for developing the regulatory framework for second pillar pensions in the Netherlands. In the Ministry of Finance he has been responsible for Tax Legislation. Theo Langejan has been chairman of the European Social Protection Committee for 2 years, on a national level he chaired the so called “Parameter” commission that developed the Dutch UFR to be used to discount pension liabilities.

In 2017 Theo Langejan joined the Federation of Dutch Pension Funds to help develop a new pension contract, and since 2019 he also leads the Brussels office of the Federation of Dutch Pension Funds.

Theo Langejan was in 2019 and 2020 a member of the National Steering Group that designed the new pensions contract.



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DR. SEAN CLEARY is the BMO Professor of Finance, Smith School of Business, Queen's University. He is the Chair of the newly-established Institute for Sustainable Finance based at Smith, as well as the founder and Director of the Master of Finance program.

He holds a Ph.D. in finance from the University of Toronto, an MBA, and the Institute of Corporate Directors (ICD.D) designation. He is a CFA charter holder, is a current member of the CFA Society Toronto Advisory Council, and is a former member of the Board of Directors for the Toronto CFA Society and the Atlantic Canada CFA Society (where he served as President).

Dr. Cleary has authored 14 finance textbooks and has published more than 30 research articles, including several in top tier finance journals. His publications have been cited over 3,400 times and he has received several major research grants. His most recent research and educational interests focus on the field of sustainable finance. He is an Associate Editor for two finance journals and frequently serves as a reviewer for many of the top finance journals. Dr. Cleary regularly serves as an expert witness on cost of capital and capital markets.



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On January 3, 2011, **EDWARD M. SMITH** was elevated to Chief Executive Officer of Ullico Inc. after serving as its President since May of 2008. Ullico Inc., founded in 1927, provides insurance and financial solutions for labor unions, union employers, union benefit funds, and union members. Prior to becoming President, Mr. Smith served as Ullico Inc.'s Executive Vice President from January 2007 until May 2008.

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. He has also been a key benefactor to children's charities including the Therapy Center, the "I Can Read" Program, he serves as the president of the Shawnee College Foundation, and founded the Connell F. Smith Homer Brown Scholarship Fund.

Smith attended Shawnee College and graduated with an Associates of Arts degree in 1974. He 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. He is now an active board member for the National Coordinating Committee for Multiemployer Plans (NCCMP), Terrence J. O'Sullivan Charitable Foundation, Laborers CARE, America's Agenda-Healthcare for All, WORKING AMERICA, Good Jobs First, and serves as a trustee for the AFL-CIO Staff Retirement Plan.



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NICOLAS J. FIRZLI is director-general of the World Pensions Council (WPC), the global think-tank & asset owners association. He is a graduate of Canada's McGill University (Statistics & Financial Economics), an alumnus of the HEC School of Management (MBA Corporate Strategy & Marketing) and the University of Paris Law School (LL.M. Corporate Law, summa cum laude) and has conducted research at the University of Louvain (UCL) Doctoral School of Economics and Management in Waals Brabant.

Mr. Firzli is co-chair of the World Pensions Forum (WPF) held annually in a G12/EU capital, coordinator of the G7 Pensions Roundtable held on the sidelines of the G7 Summit, co-chair of the Singapore Economic Forum (SEF APAC+ Summit) and cofounding-member & advisory councillor of the World Bank Group Global Infrastructure Facility (GIF).

He has chaired the main Asset Owners Roundtable of the 2015 Climate Change Conference (Paris COP 21 Summit) and (co)authored and helped develop key notions such as "Modern Trusteeship and Fiduciary Capitalism", "The SDG-Driven World Economy", "The Pension Wealth of Nations", "Sustainable Finance Shifting the Trillions", "The Geoeconomic Century" and "Infrastructure as an Asset Class"



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Session 3

DIGITAL TRANSFORMATION OF HEALTHCARE



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MAYA MATTHEWS has worked in public health for the past 20 years. She was appointed as Head of the Performance of Health Systems Unit, at the European Commission's Health and Food Safety Directorate General in October 2020. She was previously Deputy Head of Unit in the Strategy and Coordination unit. From 2013-2016, Maya was posted to the European Union's Delegation to the United Nations in Geneva where she covered health issues and relations with the World Health Organisation. Before joining the European Commission in 2008, Maya worked in Brussels for European Network of Health Promotion Agencies (now Eurohealthnet) and consulted on reproductive health, HIV prevention and Tuberculosis. Maya holds a BA in Human Sciences from Oxford University and a Masters in Health Promotion Sciences from the London School of Hygiene and Tropical Medicine where she also worked as a researcher from 1993-1995 on HIV knowledge, attitude and behaviour surveys in Europe.



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Graduated from a French Business School in Paris (ISG) and qualified as a Chartered accountant in 1999, **BERTRAND BOIVIN-CHAMPEAUX** is an expert regarding financial and actuarial regulations for insurance and pension industry, as well as for social welfare programs. For ten years, he worked in an audit firm (PwC), in financial services, where he was in charge of a portfolio of French and European insurance companies and mutuals.

In 2003, he joined the CTIP, the professional association of paritarian insurers (covering 13 millions of employees, with €188 billion in assets and a turnover of € 28 billions) where is appointed as a Head of Insurance & Pension Unit. He advocates in France for workplace health insurance plans and occupational pensions funds. He participates to negotiations with the French government regarding new regulations for pensions, healthcare and long-term care activities, but also regarding actuarial and financials affairs for the insurance industry. He was actively involved in the Solvency II negotiations at a French and European level from 2008 to 2016 and now takes part in the European negotiations for the 2020 Solvency II Review. He has also led the negotiations with the French government for the new tax framework for paritarian insurers implemented in 2012 in France.

He is a member of working groups of the French Accountancy Authority (ANC) and participates to working groups of the French Association of Actuaries. He is also a member of the French High level Expert Group on Ageing (HCFEA) since December 2016 and of the High Committee of the Financial Sector (CCSF) since 2014. He is appointed at the Consultative Expert Group of the French Supervisory Authority (ACPR) since 2012, and as Secretary General of the National Guarantee Fund for Paritarian Insurers since 2006. He works as a lecturer at Paris La Sorbonne University for a Master Class in social protection.



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AULI RYTIVAARA is a Chief Medical Officer for the Confederation of Finnish Industries EK since 2019.

Education: MD, Specialist Doctor in Occupational Health Medicine

Auli has worked for about 20 years in the Occupational Healthcare field as an occupational healthcare physician. Prior to starting in EK, she was Chief Occupational Medical Doctor in healthcare provider Mehiläinen in Finland.

At EK she works in the areas of occupational healthcare, workability support, social insurance and also she is member of the management board of the Finnish Institute of Occupational Health, Finnish Workers' Compensation Center, Finnish Work Environment Fund and EU-OSHA.

She still works as a doctor once a week at a healthcare provider.



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MARC KOEHN is the CEO of Gevity Consulting, Canada.

Marc is an entrepreneur, management consultant and business executive. As CEO of Gevity Consulting, he leads one of Canada's largest independent Health, Social Services and Life Sciences focused consulting firms. Working with clients in both public and private sector settings, he regularly advises on strategies and tactics pertaining to a range of topics including standards based integration, data driven decision making and analytics, and system transformation.

A proud father of two daughters pursuing STEM careers, Marc is an avid snowboarder and skier, passable soccer player and occasional cyclist.

Marc holds a Bachelor in Computer Science from the University of Victoria and a Master of Business Administration from Simon Fraser University. He has completed Harvard University's Leading Professional Services Firms executive program and holds the Information Systems Professional (I.S.P.) designation from the Canadian Information Processing Society (CIPS) as well as the Certified Professional in Healthcare Information and Management Systems (CPHIMS)[™] designation from the Healthcare Information and Management Systems Society (HIMSS).



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DR. PARALKAR is a Senior Vice President and National Medical Director in Segal's Chicago office with over 20 years of experience. Dr. Paralkar leads Segal's Medical Management consulting and has specialized expertise in on-site clinics, wellness programs, medical management program design, health care informatics, network management strategies to optimize health improvement while containing costs, and evaluation and implementation of disease management and wellness programs.

Dr. Paralkar's extensive experience in health care operations, informatics and consulting includes positions at UnitedHealth Group (UHG) and Ingenix (now Optum Insight), where she provided data centric clinical expertise to clients in the payer, public sector and employer markets. She was responsible for the Care Management ROI model as the Director of Product Development for the Care Management suite of products at Optum.

Prior to joining UHG, Dr. Paralkar worked at a Fortune 500 company, Navistar, in various capacities for six years. The last position Dr. Paralkar held at Navistar was Associate Medical Director, where she was responsible for occupational health and disability, on-site clinics, on-site wellness programs, health benefits plan design and health care purchasing.



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Session 4

DIGITAL TRANSFORMATION OF HEALTHCARE



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STEFAN KRÖPFL is the Global Head of Life Business Insights & Governance at Zurich Insurance Company Ltd. In this role, Stefan is responsible for delivering actionable and relevant analytical support for steering the Life portfolio, including pricing and experience insights. He is managing internal rules & policies including product approvals and monitoring industry trends and market developments. Since 2015, he has been part of the team of Zurich and Oxford University working on “Income Protection Gaps” and “Agile Workforce Protection”. Stefan also is a member of the Standing Committee Future of Pensions of PensionsEurope and he served on the World Economic Forum Expert Committee on Retirement Investment Systems Reform. He joined Zurich Insurance Company in July 2009 and is based in Zurich, Switzerland.

Previously, Stefan was Head of Life Planning and Development, Head of Strategy Global Life and Principal Manager in the Internal Consulting unit of Zurich Insurance Company Ltd. Before joining Zurich, Stefan worked with UBS in Zurich. He started his career with McKinsey & Company, Inc. in Munich.

Stefan holds a PhD from the chair of Banking and Finance at Universität Lüneburg (Germany) and a Diploma (Dipl. Kaufmann) from Universität Regensburg (Germany).



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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.



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LIINA CARR was re-elected ETUC Confederal Secretary in 2019, having first been elected in 2015.

Her responsibilities at ETUC include macroeconomic policy, economic governance and the European Semester, the European Pillar of Social Rights, social protection, external relations, implementation of UN Agenda 2030 Sustainable Development Goals in the EU and development cooperation, as well as human resources.

Liina has been a member of the European Economic and Social Committee since 2004. From 2015-2019 she handled a wide range of issues at ETUC including trade, mobility, posting of workers, the European Labour Authority, migration, social protection and development cooperation policies. Liina studied law and worked in the private sector in Estonia and Britain and worked in academia and the public sector in UK. In 2002 she started working for the Confederation of Estonian Trade Unions (EAKL) where she served as International Secretary from 2004 to 2015.

During EU accession, she was part of the trade union team working with the Estonian government to implement EU social and labour legislation.



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Maxime Cerutti was appointed Director of BUSINESSEUROPE's Social Affairs department in January 2012. He is responsible for a diverse portfolio of social affairs and labour market policy issues as well as the day-to-day management of the department. He also coordinates BUSINESSEUROPE's engagement as a social partner in the context of the European social dialogue.

Maxime joined BUSINESSEUROPE in November 2007 as social affairs adviser. Prior to this, he worked between 2005 and 2007 as a policy officer at the European Youth Forum in Brussels. He started his professional career with a six-month internship at the French ministry of Foreign Affairs in Paris, where he followed the work of the EU Council on Employment and Social Affairs.

Graduated in European law and political science, Maxime holds a Master degree from Sciences Po Paris, a double law degree from the university of Bordeaux in France and the university of Canterbury in the UK, and he participated in a summer session at the University of California at Berkeley in the United States.

His mother tongue is French. He speaks English fluently, is at ease in Italian, and is a basic user of German and Spanish.



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