

November 26, 2020
8:45 am MST

Webinar: Economic and Investment Risk in Retirement Plans - Governance Considerations

Our speaker, **Gerry Wahl, Managing Director, The Pension Advisor**, will speak about the current economic and investment situation which is potentially risky for pension plan sponsors, particularly DC and RSPs plan sponsors. DC and RRSP member accounts have been severely impacted in many cases: they will be looking for accountability.

The presentation will be of interest to Capital accumulation plan (CAP) sponsors and pension plan committee members focusing on governance and risk minimization.

Topics and take-aways will include:

- 1) Fatal flaw in CAPs
- 2) Key CAP risks
- 3) Sponsor Risk minimization – governance
- 4) A governance framework

Speaker:

Gerry Wahl, B. Comm (Actuarial Science), CMA, MBA

Gerry has a background in accounting, taxation, treasury, and pension administration. He has hands on experience as a CRA business tax auditor, mine controller, treasurer, and assistant treasurer for a large global mining company.

As assistant treasurer Gerry was the Investment Manager for the company's pension programs (~C\$2.3 billion in 8 DB plans, 23 CAPs and RCA's in 8 companies in Canada, the US and UK). A primary responsibility was developing and organization pension governance frameworks and monitoring on-going pension performance and DB plan funding.

Gerry has also served on several pension and charitable organization boards and committees. He does pension seminars for the CMAs, CGAs, CPAs, Federated Press, and has published several articles on pension issues (Canadian Investment Review and Benefits Canada.)

He is also an active member of the Financial Executive Institute Pension Committee, the College and University Retiree Associations of Canada Pension Committee and, has been actively involved in pension reform proposals in Canada.

Implementing effective pension governance frameworks and on-going reporting structures is a key focus of Gerry's practice.

DATE: Thursday, November 26, 2020

LOCATION:



TIME: 8:45 – 9:00am MST – AGM & Welcome
9:00 – 10:00am MST – Presentation

COST: Complimentary - Alberta ISCEBS Members

REGISTRATION: Please [click here](#) to register via Zoom.

RSVP: By November 23, 2020

QUESTIONS: Email: ab.iscebs@gmail.com



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