

Canadian Legal & Legislative Update

July 15-16, 2026

DoubleTree by Hilton Montreal
Montréal, Québec

Preconference: July 14, 2026

www.ifebp.org/can-legal

Canada's Source for
**Legal and
Regulatory
Education
in Employee
Benefits**

Canadian Legal & Legislative Update

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Canada's Source for Legal and Regulatory Education in Employee Benefits

Stay informed on the latest legal, regulatory and technological advancements shaping your plans by attending the Canadian Legal and Legislative Update. Gain valuable insights into need-to-know developments—including the impact of AI and cybersecurity—to help your organization navigate challenges and stay ahead throughout the upcoming year. Don't miss this opportunity to set a strong foundation for success.

Benefits of Attending

- Focus on the critical information you need to know now with fresh and relevant topics.
- Gain a deeper understanding of global and national issues affecting the pensions and benefits industry and their impact on your funds.
- Take advantage of opportunities to network with your peers.

Who Should Attend

- This program is especially designed for labour and management trustees, public service trustees, professional advisors and corporate plan sponsors.

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I have always felt that this program helps me to meet my compliance and regulatory obligations. And the program introduced me to the “new” best practices.

Laurie Caforio
ATB Financial

SESSIONS AT A GLANCE

Breakfast and lunch will be provided.

WEDNESDAY July 15, 2026	
8:30-9:30 a.m.	Cross-Country Benefits Update
9:45-10:45 a.m.	Cross-Country Pension Update
11:00 a.m.-12:00 noon	New and Expanded Protections for Workers
1:00-2:00 p.m.	Understanding Your Fiduciary Obligations With Respect to Cybersecurity
2:15-3:15 p.m.	When Pension and Benefit Plans Invest Outside Canada—Legal and Tax Pitfalls to Avoid
3:30-4:30 p.m.	Tax Rules: Where to From Here?
THURSDAY July 16, 2026	
8:30-9:30 a.m.	Governance and Decision Making: CAPSA Guidelines in Practice
9:45-10:45 a.m.	Data Access and Privacy: What Trustees Must Know
11:00 a.m.-12:00 noon	What If Your TPA Fires You?
1:00-2:00 p.m.	Pension and Benefit Value: Lessons, Risks and Best Practices
2:15-3:15 p.m.	The Rise of LTD Claims
3:30-4:30 p.m.	Human Rights and Pension and Benefit Plans: Risks and Responsibilities

Sessions are subject to change.

(All times are listed in Eastern Standard Time.)

Introducing One-Day French Track!

New to 2026, we will be offering a one-day French track of the Canadian Legal and Legislative Update held concurrently with Day One of the English program.

Stay tuned for upcoming details on this exciting option.

Nouveauté en 2026 : Perspectives & enjeux légaux et législatifs

Nous offrirons une journée complète de sessions en français dans le cadre du Canadian Legal & Legislative Update, présentée en simultané avec les sessions en anglais de la première journée. *Restez à l'affût pour plus de détails.*

PROGRAM SCHEDULE

(All times are listed in Eastern Standard Time.)

TUESDAY | July 14, 2026

4:00-6:00 p.m.

Registration/Information

Preconference topic to be announced in the new year!

WEDNESDAY | July 15, 2026

7:30 a.m.-4:30 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Cross-Country Benefits Update

This session will provide an overview of legislative and case law developments of importance to benefit plans across Canada.

9:45-10:45 a.m.

Cross-Country Pension Update

This session will provide an overview of legislative and case law developments of importance to pension plans across Canada.

Register online at www.ifebp.org/can-legal.

WEDNESDAY | July 15, 2026 *(continued)*

11:00 a.m.-12:00 noon

New and Expanded Protections for Workers

The legislative protections offered to Canadian employees in the public and private sectors are changing in some significant ways. From legislated pay transparency to the “right to disconnect” to Québec’s expanded privacy legislation, protections in many jurisdictions are evolving to improve employment equity, privacy and work–life balance.

12:00 noon-1:00 p.m.

Lunch *(provided)*

1:00-2:00 p.m.

Understanding Your Fiduciary Obligations With Respect to Cybersecurity

Fiduciaries of employee benefit plans have a legal duty to act in the best interests of plan participants and beneficiaries. This responsibility includes:

- Preventing fraud
- Detecting fraud
- Responding to fraud
- Legal and legislative updates
- Records that belong to trustees.

2:15-3:15 p.m.

When Pension and Benefit Plans Invest Outside Canada— Legal and Tax Pitfalls to Avoid

This session will be a two-person expert discussion of the legal and tax requirements for Canadian pension and benefit plans when they invest outside Canada. Takeaways will include:

- Required fiduciary analysis of investment
- Safest vehicles through which the investment can be made
- Steps that can be taken to reduce potential risks posed by foreign investment.

Canadian Legal and Legislative Update

WEDNESDAY | July 15, 2026 *(continued)*

3:30-4:30 p.m.

Tax Rules: Where to From Here?

This session will explore the changes, challenges and opportunities arising from the latest budgetary developments, providing you with the knowledge needed to navigate the evolving tax landscape.

4:30-5:30 p.m.

Welcome Reception

THURSDAY | July 16, 2026

7:30 a.m.-4:30 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Governance and Decision Making: CAPSA Guidelines in Practice

Strong governance is the foundation of effective pension and benefit plan oversight. Gain practical strategies to strengthen decision making and oversight, from governance structures to the bare minimum requirements under CAPSA Guidelines.

9:45-10:45 a.m.

Data Access and Privacy: What Trustees Must Know

From the Patriot Act to evolving privacy laws, organizations must understand the legal responsibilities tied to data access, storage and usage. This session explores where data resides, how regulations apply and the key steps to ensure compliance while safeguarding sensitive information.

THURSDAY | July 16, 2026 *(continued)*

11:00 a.m.-12:00 noon

What If Your TPA Fires You?

Break down critical contract clauses, such as liability limitations and service obligations, while highlighting what to watch for in agreements. We'll also explore strategies for managing change and identifying which services may be better handled in-house when contract terms fall short.

12:00 noon-1:00 p.m.

Lunch (provided)

1:00-2:00 p.m.

Pension and Benefit Value: Lessons, Risks and Best Practices

This session shares lessons learned from plans across Canada; explores trustee obligations and the risks of miscommunication; and highlights tools such as pension estimates, member statements and annual communication schedules. We will also discuss how to build accessible, effective and compliant communication strategies that reinforce the value of benefits and pensions.

2:15-3:15 p.m.

The Rise of LTD Claims

Explore the drivers behind the rise in LTD claims; the impact on plan sustainability; and strategies trustees, service providers and benefits professionals can use to manage risks while supporting members effectively.

3:30-4:30 p.m.

Human Rights and Pension and Benefit Plans: Risks and Responsibilities

Pension and benefit plans were often designed decades ago, and some structures may unintentionally conflict with today's human rights standards. Session attendees will:

- Examine potential risks for trustees, including age discrimination, job-sharing impacts, LTD and health benefit concerns, and other plan features that could be challenged.
- Learn how to identify vulnerabilities, mitigate risks and align plan governance with evolving human rights obligations.

Sponsorship Opportunities

Sponsor the Canadian Legal and Legislative Update

Showcase your brand and foster meaningful relationships by connecting with engaged professionals seeking insights into evolving legal and regulatory developments. Engage with this targeted audience ready to explore new resources and partnerships!

You'll receive brand exposure before, during and after the conference with:

- Sponsor recognition on our conference webpage and in preconference promotional emails
- Recognition on large-scale sponsorship slides as part of general session introductions
- Your company logo featured on eye-catching sponsor banners and table tents prominently displayed at the conference
- Free company listing on the conference app including your logo, company description and contact information for attendee inquiries
- Company brochure display in our Sponsor Resource Area
- Sponsor recognition on your company representatives' name badges to network with pride
- Recognition in the annual sponsor recap ad included in *Plans & Trusts* member magazine.
- A FREE, six-month-long company listing (value of US\$1,195 when purchased) in our Service Provider Directory, located on the Foundation home page. This online resource is for members in search of new vendors, products and services.

To learn more, please contact Diane Mahler at dianem@ifebp.org.



Hotel Information

DoubleTree by Hilton Montreal Montréal, Québec

Reservation Deadline: June 15, 2026

Rates: C\$299 single/double occupancy

Hotel Accommodations: You will be charged a C\$400 deposit upon registration. Please specify your hotel requirements on the registration form.

Hotel Cancellation Policy: Cancellations within 72 hours of the scheduled arrival date will incur a cancellation fee equal to the entire stay of the reservation booked.

For additional hotel information, visit our Hotel/Travel tab at www.ifebp.org/can-legal.

**Note: Hotel room availability is not guaranteed outside of scheduled program dates.*



Hotel Details

Located in the heart of downtown Montréal's vibrant Quartier des Spectacles, the DoubleTree by Hilton Montreal offers modern comfort with direct access to the city's Underground City and Complexe Desjardins. The hotel features spacious rooms with city views, an indoor pool, a fitness centre and on-site dining. Its central location makes it ideal for exploring Montréal's festivals, shopping and cultural attractions.

Location Details

Join us in Montréal, a vibrant city where European charm meets North American energy. Known for its world-class dining, lively festivals, and rich arts and culture scene, Montréal offers endless opportunities to explore and enjoy. From the cobblestone streets of Old Montréal to the scenic views atop Mount Royal, the city provides a memorable backdrop for your program experience.



Additional Education Opportunities

Trustee Training Pathway

Marriott Downtown Eaton Centre
Toronto, Ontario

Foundations of Trust Management Standards (FTMS®)

May 4-5, 2026



Advanced Trust Management Standards (ATMS®)

Sessions A and B

May 4-5, 2026



Master of Trust Management Standards (MTMS®)

Sessions A and B

May 6-7, 2026



For more information, visit www.ifebp.org/cdtrusteeopath.



59th Annual Canadian Employee Benefits Conference

August 30-September 2, 2026

Halifax Convention Centre
Halifax, Nova Scotia

For more information, visit
www.ifebp.org/canannual26.



Canadian Investment Institute

November 9-11, 2026

The Royal at Atlantis
Paradise Island
Nassau, The Bahamas

For more information, visit
www.ifebp.org/canadainvest.

REGISTRATION

Register today at www.ifebp.org/can-legal.

CONFERENCE REGISTRATION FEES

Through June 3, 2026

Member: C\$1,625 | Nonmember: C\$1,845

After June 3, 2026

Member: C\$1,925 | Nonmember: C\$2,145

Save C\$300 when you register before June 3!

REGISTRATION INCLUDES

Breakfast | Lunch | Welcome Reception

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency. More information is available at www.ifebp.org/ce.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.



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Register by June 3 to save
C\$300 with the early
registration discount!

Sessions include:

- New and Expanded Protections for Workers
- Understanding Your Fiduciary Obligations
- With Respect to Cybersecurity
- Governance and Decision Making: CAPSA Guidelines in Practice
- Human Rights and Pension and Benefit Plans: Risks and Responsibilities.

Visit www.ifebp.org/can-legal to register
or call (888) 334-3327, option 2, for more
information.

