

WORLD PENSION ALLIANCE TRANSATLANTIC PARTNERSHIP

ANNUAL CONFERENCE 2022



Speaker Information

Tuesday 7 June – Wednesday 8 June 2022



WORLD
PENSION
ALLIANCE

HOSTED BY

AIST

WELCOME AND INTRODUCTORY SPEECH



Eva Scheerlinck, World Pension Alliance, Chair and Chief Executive Officer, AIST



Eva Scheerlinck was appointed CEO of the Australian Institute of Superannuation Trustees (AIST) on March 23, 2017 and is responsible for leading the peak body of the \$1.6 trillion profit-to-member superannuation industry.

Eva joined AIST in 2010, moving into the role of AIST's Executive Manager of Governance and Stewardship. During her time at AIST, Eva has been actively involved in reforming governance standards for superannuation funds in Australia and championing initiatives aimed at improving retirement outcomes for groups that often fall through the cracks in the super system including women, low income earners and Indigenous Australians.

Eva has previous experience heading up professional associations, including six years as CEO of the Australian Lawyers Alliance. Eva holds a Bachelor of Laws and

Bachelor of Arts from the Queensland University of Technology, as well as a Graduate Diploma of Community Management from the University of Technology, Sydney.

She was admitted as a solicitor in 2000. She is a Graduate Member of AIST's Trustee Director Course and a Graduate Member of the Australian Institute of Company Directors. Eva is a member of the ASX Corporate Governance Council, Chair of the Indigenous Superannuation Working Group and the Chair of the World Pension Alliance.



SESSION ONE: GEOPOLITICAL ENVIRONMENT – HOW ARE PENSION FUNDS DEALING WITH TURMOIL?



Derek W. Dobson – Chief Executive Officer, CAAT Pension Plan



Derek is CEO of CAAT Pension Plan, one of Canada’s most sustainable pension plans, and Co-Chair of the Canadian Public Pension Leadership Council (CPPLC). He sits on the Board of the Association of Canadian Pension Management (ACPM) and the Pension Committee of the C.D. Howe Institute. He is a founding faculty member of the Masters of Trust Management Standards (MTMS) at the International Foundation of Employee Benefits and Pensions (IFEBP).

Derek received the 2019 ACPM Industry Award in recognition of his leadership and creativity in addressing challenges in the Canadian

retirement income system. He continues to advocate for innovative solutions to expand access to sustainable and efficient pension plans.

He is a featured speaker at conferences and contributor to *Plans & Trusts*, *Benefits Canada*, *HR Reporter* and *ACPM Observer*. Derek is an Associate of the Canadian Institute of Actuaries (CIA) with a degree in mathematics from the University of Waterloo.



Gregg McClymont, Executive Director, Public Affairs, IFM Investors



Gregg's career has encompassed academia, politics, pensions, and investment management. Gregg joined IFM Investors in July 2020 from leading UK industry pension fund The People's Pension.

He was previously UK Shadow Minister of State for Pensions 2011-2015 and a Member of Parliament 2010-15.

Gregg was also a member of the Prime Minister's Further Devolution to Scotland Commission 2014. Before entering politics, he was a Fellow of St Hugh's College, Oxford – having trained as a historian in the Universities of Glasgow, Pennsylvania and Oxford.

After losing his parliamentary seat in the 2015 General Election, Gregg spent three years at Aberdeen Asset Management/Aberdeen Standard Investments.

He is the co-editor of three volumes on global pension system design, Towards a new pensions settlement: the international experience (Rowman and Littlefield, 2016, 2018, 2020).



Eric Müller-Borle, Founder, Global Benefits Vision



Eric founded Global Benefits Vision magazine and is its editor and CEO. He also operates 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 GBN 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.



Ann Verlinden, Secretary General, PensioPlus



Ann Verlinden has been very engaged with pension funds since the beginning of her career. She starts as an Actuary, specialised in Pension Funds Management, followed by her activities as a Consultant specialised in Employee Benefits. Enriched with these experiences, Ann joins PensioPlus as a Senior Advisor in 2012.

She distinguishes herself within both national and European working groups, amongst which Sigedis, the Institute for Actuaries in Belgium, PensionsEurope and AEIP. Thanks to her specific knowledge of the sector, Ann serves as Secretary-General ad interim at PensioPlus since 2015.

As a Secretary-General today, Ann takes the responsibility for the sector's lobbying activities at national and European level, the organisation of training and numerous activities, amongst which the annual Financial Seminar.

Within PensioPlus, Ann takes the lead in files such as IORP II, stress tests, and many others



SESSION TWO: COP26, NET ZERO, CARBON TRANSITION AND ALL THINGS SUSTAINABILITY



Sonia Axter, Managing Director, Head of Asset Management, Ullico



Ms. Axter is a Managing Director for Ullico Investment Advisors in its Infrastructure Investments group. Ms. Axter has 17 years of experience in infrastructure development, principal ownership and project management.

Prior to joining Ullico, Ms. Axter was a senior member of Deutsche Bank's alternatives investment group and performed both acquisitions and asset management of infrastructure assets. Ms. Axter was also formerly a senior member of Bechtel Enterprises, the infrastructure finance and development arm of Bechtel Group Inc.

In her tenure at Bechtel, Ms. Axter led the redevelopment of one of the first public-private partnerships in the U.S., the \$150 million light rail and real estate Cascade Station development in Portland, Oregon.

Prior to business school, Ms. Axter spent 7 years as a Project Manager and Project Engineer on a range of transport, utility and environmentally-impacted civil construction projects for the Pacific NW division of Granite Construction Company. Ms. Axter holds an M.B.A. from Stanford Graduate School of Business and a B.S. in Civil Engineering from the University of Washington



Kelly Christodoulou, Senior ESG Consultant, Investments, AustralianSuper



Kelly has been actively considering ESG issues at AustralianSuper since 2008. She is responsible for the ESG integration and stewardship (company engagement and proxy voting) for the Funds global listed equities portfolio and some private markets, including property and infrastructure.

She is also responsible for the due diligence and monitoring of the external listed fund managers, including assessing their transition toward a Net 0 world.

Kelly is a Board Member of the Institutional Investor Group on Climate Change (IIGCC) and Co-Chair of its Adaptation & Resilience Committee. She is on the Sustainable Development Investments - Asset Owners Platform (SDI-AOP) Market & Members Committee, and Research Committee, and she is on the Advisory Board of the Taskforce on Valuing Water Initiative.

She holds a Bachelor of Commerce, Master of Finance, Post Graduate Certificate in Social Impact, and is currently studying the Financial Times Non-Executive Directors diploma.



Matti Leppälä, Secretary General, PensionsEurope



Matti Leppälä is Secretary General and CEO of PensionsEurope, 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 in assets. Leppälä is a member of the Occupational Pensions Stakeholder Group of EIOPA and he was either the Chair and Vice-Chair of the OPSG between 2013 and 2018.

He was a member of the European Commission's High-Level Group of Experts on Pensions and Chair of the World Pension Alliance, both between 2018 and 2019.

Prior to joining PensionsEurope in 2011 Leppälä worked for 11 years for The Finnish Pension Alliance with responsibility for EU and international affairs as well as investment policy and legal issues.

In the 1990s he worked for Finnish trade unions in collective bargaining, labour law and social policy. During that time, he was a member of the board of pension insurance company, Veritas.

Leppälä started his professional career at the Law Drafting Department of the Ministry of Justice in Finland and has an LL.M. and an Executive MBA in insurance and financial services.



Brian Minns, Managing Director, Responsible Investing, University Pension Plan Ontario



Brian Minns is UPP's Managing Director, Responsible Investing (RI). He oversees UPP's RI strategy, ensuring our RI commitments are achieved through our investment processes and stewardship practices and that we are communicating openly and transparently about our RI practices as they evolve.

Brian came to UPP after nearly a decade at Addenda Capital, culminating in his most recent position as Vice-President, Sustainable Investing. Prior to Addenda, he held positions in responsible investing with CPP Investments and Mercer.

A veteran in responsible investing, Brian is Co-founder and past Co-chair of the Canadian Responsible Investing Working Group, a member of the CFA Institute's ESG Technical Committee, and a member of the RIA's Policy Stewardship Group.

He is a Chartered Financial Analyst and hold a Master's in Environmental Studies from York University, the Sustainable Investment Professional certification from Concordia University, and a Bachelor of Science in Mechanical Engineering from Queen's University.



Albena Vassileva, Executive Director, Infrastructure, IFM Investors



Albena is responsible for the sourcing, execution and management of infrastructure investments across Europe, as well as the development of key industrial relationships. Albena has more than 14 years of Private Equity track record, leading a range of investments, transformations and exits across industry sectors and geographies, as well as supporting the growth of portfolio companies at Board level.

At IFM, Albena is actively involved in Energy Transition initiatives and sits on the Board of Veolia Energy Contracting Poland. She also serves as Chair of the Board of IFM Investors Netherlands. Albena was previously Managing Director at Advent International, where she was also instrumental in setting up a new regional hub covering several countries.

Prior to that, she held a senior investment role with ABN AMRO Capital, focusing on investments in Telecommunication, Media and Technologies.

Immediately prior to joining IFM, Albena led the M&A Advisory team for Natural Resources at ABN AMRO, covering the Energy, Maritime, Commodities and Chemicals value chains.



SESSION THREE: AGEING WELL - HEALTH CARE AND AFFORDABILITY



Susan Bird, CEBS, Fellow ISCEBS, HIA, ICD.D; President, The McAteer Group of Companies



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.

Ms. Bird was the 2017-2018 elected 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 treasurer of MEBCO – the Multi-Employer Benefit Council of Canada – a subject matter expert organization that educates and lobbies governments on issues impacting multi-employer health and pension plans.

She is the Chair of the International Foundation of Employee Benefit Plans (IF) Canadian Board and a member of its strategic planning committee and a Voting Director. She is a past member of several other IF committees. She has been involved in the development of education programs designed for 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 currently participates on CAPSA's committee for ESG guidelines. She is the co-chair of the Financial Services Regulatory Authority of Ontario (FSRA) multi-employer pension plan technical advisory committee.



Susan 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 and chairs its foundation board.



Bertrand Boivin-Champeaux, Head of Insurance and Pension Unit, CTIP



Graduated from a French Business School in Paris (ISG) and qualified as a Chartered accountant, Bertrand BOIVIN-CHAMPEAUX is an expert regarding health insurance and pension industry, as well as for social welfare programs.

After ten years of practice at PwC, in financial services, he joined the CTIP, the professional association of paritarian insurers, which represents not for profit health insurers managed by employers and employees representatives – covering 13 millions of employees-.

He advocates in France and Europe for workplace health insurance plans, long term care insurance schemes and occupational pensions funds.

He is a member of the French High level Expert Group on Ageing (HCFEA) and of the High Committee of the Financial Sector (CCSF) at Banque de France.

At European level, he is a Board member of AEIP, the Association of european paritarian institutions.



Charlotte Cartwright, Partner, Eversheds Sutherland



Charlotte Cartwright is a partner in the Eversheds Sutherland Global Benefits Practice, with over 10 years of experience in advising companies and providers on all aspects of benefit provision – both for UK based, and globally mobile, individuals, with a specialism in UK pensions law.

Charlotte was included in the Law.com’s 2021 list of the best 25 U.K. women in law aged under 40 (for all types of law), and has been praised by clients for her ability to breakdown complex legal issues into straightforward and manageable decisions.

Charlotte is actively involved in developing pensions law in the UK, including in her role on the legislative and parliamentary sub-committee of the Association of Pension Lawyers (the committee which takes the lead on consulting with government and regulators on upcoming changes on behalf of the Association).



Dr. Elaine Chin, Founder, Innovation Health Group



Elaine is on a mission to combat the predictable and preventable illnesses that impact us all. After seeing too many people she loved pass away from predictable and preventable illnesses, she decided to devote her life's work to facing them head on.

Thirty years later, Elaine is a respected thought leader in the space of personalized medicine, integrative health and corporate wellness. With her experience comes the science, safety, and rigor that is often lacking in the wellness space.

She is the founder of Executive Health Centre, a premiere personalized medicine practice in Canada and Innovation Health Group, offering virtual health testing, consultation services, enterprise and well programs.

She has served as the Chief Wellness Office at TELUS Communications. Presently, she is an expert contributor to CP24, CityLine TV show and consultant at Good

Housekeeping Magazine in New York.

Her 2021 book, “Welcome Back! How to reboot your physical and mental resiliency for a post-pandemic world”, is cited as a Top 10 Wellness Book by Indigo Books.



At the start of the pandemic, Dr. Chin launched the Masking Together Challenge and has helped to raise close to \$500,000 so far to secure safe housing for house staff, support research at the University of Toronto and distribute masks and offer her newest book, WELCOME BACK for frontline healthcare workers in Canada.

Elaine received her degree in Medicine at the University of Toronto in 1988 and in 1994 received her MBA from the same university.



Giuseppe Perretti, Policy Advisor Healthcare & Provident Funds at the European Association of Paritarian Institutions - AEIP



Giuseppe Perretti is Policy Advisor for Healthcare & Provident Funds at the European Association of Paritarian Institutions – AEIP. He is responsible for the coordination of AEIP’s working groups on healthcare as well as of the working group on the construction sector focusing on skills, labour mobility and health and safety at work.

Before joining AEIP in November 2021, he worked in Brussels-based public affairs consultancies supporting clients in the pharmaceutical and healthcare sector on global health, NCDs, vaccination and agri-food policies. He also worked for NGOs advocating for patients and consumers’ rights. In 2019, he enjoyed being part of the Internal Market and Consumer Protection (IMCO) Committee secretariat at the European Parliament.

Giuseppe holds a Master in Conflict Resolution and Mediation at Tel-Aviv University and a Master in International Relations at the University of Bologna.



SESSION FOUR: CHANGING NATURE OF WORK



Mariah M. Becker, Director of Research and Education, NCCMP



Mariah Becker joined the National Coordinating Committee for Multiemployer Plans (NCCMP) in 2016 as the Director of Research and Education. In this role, she works extensively to evaluate and design policy & technical proposals to protect and strengthen the multiemployer system, as well as to develop analysis to evaluate the economic impact of federal policies, regulations and industry developments.

Prior to joining the NCCMP, Mariah worked with single and multiemployer benefit programs for 15 years as an actuarial consultant. Mariah spent 10 years with Segal Consulting, focusing on multiemployer defined benefit pension plans. While at Segal, she worked with clients to assess their funded position and to develop strategies for improving funding levels, while balancing stakeholder concerns and the changing legal landscape. She also advised on other issues including actuarial projections of plan funding, as well as plan design cost studies, mergers, and withdrawal liability.

During her time with Segal Consulting, Mariah worked closely with the NCCMP on the review and design of legislation affecting the multiemployer plan community and participated in the Retirement Security Review Commission, convened by the NCCMP to consider challenges and potential solutions facing multiemployer pension plans.



Mariah assisted in analyzing the recommendations resulting from that Commission, including the proposed composite or GROW plan design. Prior to her work with Segal Consulting, she worked with Mercer focusing on defined benefit pension plans.

Mariah is a frequent speaker on multiemployer pension topics. She brings a strong understanding of the actuarial issues facing a broad range of multiemployer defined benefit plans in a range of industries, from large national multiemployer plans to smaller local plans and union staff plans. She is a Member of the American Academy of Actuaries, an Enrolled Actuary, and an Associate of the Conference of Consulting Actuaries. Mariah is also a Member of the American Academy of Actuaries Multiemployer Plans Committee. She graduated magna cum laude from Colgate University with a BA in Physics-Astronomy.



Thorsten Guthke, Head of European Office, SOKA-BAU



Thorsten is Doctor in law, specialising in EU politics and legislation. Following studies in Germany and Italy, he started a career as solicitor. Since 2006, he is active in EU policy; first in industry, and later on in financial services.

He has held senior positions in sector associations, as head of legal department at the World Savings Banks Institute, and head of European affairs at the association of public banks.

Thorsten is used to work with international organisations, e.g. OECD and UN. He is experienced in strategic programming and managing teams. From a technical point of view, he has profound expertise in sustainable finance, and capital market regulation.

Currently, he is heading the EU office of SOKA-BAU, which he has built up in 2020. Thorsten is working closely with EU Institutions, with social partners and paritarian institutions.



Shawn Haggerty, President Local 175



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.



Daisy Pitkin, National Field Director, Starbucks Campaign, Workers United



Daisy Pitkin has spent more than twenty years as a community and union organizer, working first in support of garment workers around the world, and then for US labor unions organizing with workers in industrial laundries, higher education, and food service.

She is the author of *On the Line: A Story of Class, Solidarity, and Two Women's Epic Fight to Build a Union* (Algonquin Books, 2022), and she now organizes with Workers United as the National Field Director of the Starbucks campaign.



CLOSING REMARKS

Michael D. Scott, Executive Director, NCCMP



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.



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.



The World Pension Alliance would like to thank this year's sponsors and media partner

