

Re: Pension Comparison - question and timelines confirmation

From: Murray Gold <mgold@kmlaw.ca>
To: "Kaufman, Paul (TBS)" <paul.kaufman@ontario.ca>, "Hatzis, Len (TBS)" <len.hatzis@ontario.ca>
Cc: "Veinot, Cindy (TBS)" <cindy.veinot@ontario.ca>, "Petsche, Nadine (TBS)" <nadine.petsche@ontario.ca>
Date: Fri, 16 Sep 2016 20:57:56 -0400

Hi Paul,

My preliminary thinking was based on a view of the BC Municipal Plan; I haven't yet looked at the other BC Plans. I expect they'll follow the BC pattern, but I cannot yet confirm that.

Murray

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Original Message

From: Kaufman, Paul (TBS)
Sent: Friday, September 16, 2016 8:38 PM
To: Hatzis, Len (TBS); Murray Gold
Cc: Veinot, Cindy (TBS); Petsche, Nadine (TBS)
Subject: Pension Comparison - question and timelines confirmation

Hi Murray -

To confirm our discussion, you are going to provide a comparative legal/governance analysis of how the frameworks for the two Ontario pension plans we identified (OTPP and OPSEU) and the four BC plans we identified (municipal, teachers, college, public service) compare on the issue of the authority of the pension boards and the plan partners to determine the utilization of plan surpluses. Your preliminary thinking is that in Ontario this determination is left to the partners, while in BC either the boards or the partners can make this determination.

You expect that you can provide this analysis by Monday or Tuesday.

We've provided the relevant joint trust agreements for the plans noted above and you don't expect that you need further documentation from us to respond to this request, but you will let us know if any need arises.

Cindy, if the above is inconsistent with what you are looking for please advise.

Paul

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