

Email - November 10 2016 - Fw_ Expert Panel.pdf

From: [Patricia O'Malley](#)
To: Paul.Martin@gnb.ca
Cc: [Tam, Nelson \(TBS\)](#)
Subject: Fw: Expert Panel
Date: November-10-16 12:05:06 PM

Hello Paul

Welcome to the Panel. I thought I would introduce myself and give you a little background on where we are so far.

My name is Tricia O'Malley and I have been asked to chair this august group but I expect this will very much be a team endeavour. My background is as a national technical partner at KPMG and as an accounting standard setter both in Canada and internationally at the IASB in London.

I had a brief meeting with the Treasury Board people Tuesday morning to start discussing logistics. We originally intended to try to have a brief meeting as soon as possible to introduce ourselves and to review the material the project team will provide us with to allow us to identify any other items we want to see or briefing we want to receive.

Unfortunately, schedules didn't permit that to happen so we agreed to have a full day meeting on 18 November. I believe Nelson has already sent you the meeting invitation. I certainly hope you will be able to attend in person. If not, I understand that we should be able to use video conference facilities.

Nelson is the project manager for the Panel. To help him to arrange meetings in December, could you please let him know your availability for meetings the first three weeks of the month? Many thanks.

I'm looking forward to working with you on this important project.

Regards

Tricia

Tricia O'Malley
Mobile +1 (416) 570 1924

Email - November 8 2016 - RE_ Expert Panel.pdf

From: [Uros Karadzic](#)
To: [Murray Gold](#); [Patricia O'Malley](#)
Cc: [Tam, Nelson \(TBS\)](#); [Jean Nikolov](#)
Subject: RE: Expert Panel
Date: November-08-16 6:43:04 PM
Attachments: [image001.png](#)

It looks pretty good for me, except for 9th and 15th, but I could even work around that if needed.

Uros Karadzic, FSA, FCIA | Partner | People Advisory Services

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Office: +1 416 943 2087 | Mobile: +1 416 970 2087 | uros.karadzic@ca.ey.com

Assistant: Sarah Anderton | Phone: +1 416 943 3143 | sarah.anderton@ca.ey.com

From: Murray Gold [mailto:mgold@kmlaw.ca]

Sent: Tuesday, November 08, 2016 5:33 PM

To: Patricia O'Malley <plomalley@outlook.com>; Uros Karadzic <uros.karadzic@ca.ey.com>

Cc: Tam, Nelson (TBS) <Nelson.Tam@ontario.ca>; Jean Nikolov <jnikolov@kmlaw.ca>

Subject: RE: Expert Panel

For me:

Week of the 5th – I am available before 2:00 pm on the 5th and all day (except for lunch) on the 9th

Week of the 12th, all OK except the afternoon of the 13th and the morning of the 16th

Week of 19th, not available.



Murray Gold

Partner

T: +1 416-595-2085 | F: +1 416-204-2873 | E: mgold@kmlaw.ca

Koskie Minsky LLP, 20 Queen Street West, Suite 900, Toronto, ON. M5H 3R3

kmlaw.ca

From: Patricia O'Malley [mailto:plomalley@outlook.com]

Sent: November-08-16 5:28 PM

To: Uros Karadzic; Murray Gold

Cc: Tam, Nelson (TBS); Jean Nikolov

Subject: Re: Expert Panel

Hello

Thanks so much for the quick responses. My availability clashes with yours except by some miracle I have all day on the 18th free as well.

So I agree with Uros's suggestion that we plan to use that entire day to get started.

Nelson, could you please send out a meeting invitation so we can get that date blocked in our calendars ASAP?

Also, to make that meeting as productive as it can be, we will need to get as much of the material we discussed today as we can to the members as quickly as possible.

We should probably also check availabilities for the weeks of December 5, 12 and 19 in case we have similar scheduling conflicts then. If they jeopardize our ability to deliver the report by the end of December, the Province wanted early warning of that possibility.

As a start,

Week of the 5th I am available all day every day other than an hour on the 5th and all day on the 7th.

Week of the 12th, all OK except all day 14th and 15th.

Week of 19th, free all week.

Cheers!

Tricia

From: Uros Karadzic <uros.karadzic@ca.ey.com>

Sent: November 8, 2016 16:03

To: Murray Gold; Patricia O'Malley

Cc: Tam, Nelson (TBS); Jean Nikolov

Subject: RE: Expert Panel

Hello Patricia and Murray,

Like you, I am very much looking forward to working with both of you.

- For the **two hour** meeting next week the following are open: afternoon on 14th; afternoon on 15th, after 10am on 16th, (no availability on 17th) and 18th is open.
- For the **full day** meeting the week after next: 22nd and 23rd are open.

I am on vacation out of the country the week of Nov 28 - Dec 2, although I will make myself available for calls that week if needed.

Given Murray's travel plans, and my own, should we aim for a full day meeting on Friday 18th?

Uros

Uros Karadzic, FSA, FCIA | Partner | People Advisory Services

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Assistant: Sarah Anderton | Phone: +1 416 943 3143 | sarah.anderton@ca.ey.com

From: Murray Gold [<mailto:mgold@kmlaw.ca>]

Sent: Tuesday, November 08, 2016 3:39 PM

To: Patricia O'Malley <plomalley@outlook.com>; Uros Karadzic <uros.karadzic@ca.ey.com>

Cc: Tam, Nelson (TBS) <Nelson.Tam@ontario.ca>; Jean Nikolov <jnikolov@kmlaw.ca>

Subject: RE: Expert Panel

Hi Patricia,

It's a pleasure to meet you, virtually in any event. I very much look forward to working with you and with Uros on this project.

I am out of town Nov 14-16, but available Nov 17 in the morning and pretty much any time on November 18.

Unfortunately, I am out of the country during the following week (Nov 21-28)). I would be available for full days on November 29 and December 2.

Best,

Murray

KOSKIE Murray Gold
MINSKY Partner
JUSTICE MATTERS

T: +1 416-595-2085 | F: +1 416-204-2873 | E: mgold@kmlaw.ca

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From: Patricia O'Malley [<mailto:plomalley@outlook.com>]

Sent: November-08-16 3:30 PM

To: Uros Karadzic; Murray Gold

Cc: Tam, Nelson (TBS)

Subject: Expert Panel

Hello Uros and Murray

My name is Tricia O'Malley and I have been asked to chair this august group but I expect this will very much be a team endeavour. My background is as a national technical partner at KPMG and as an accounting standard setter both in Canada and internationally at the IASB in London. I understand that a fourth member will be advised shortly -- some final formalities to be completed in a day or so.

In the meantime, I had a brief meeting with the Treasury Board people this morning to start discussing logistics. The conclusion was that we should try to have a brief meeting as soon as possible to introduce ourselves and to review the material the project team will provide us with. That will allow us to identify any other items we want to see or briefing we want to receive. We will probably also want to work out a tentative meeting schedule so we can meet the fairly aggressive timeline for our report.

After some time to allow us all to familiarize ourselves with this background information, we would like to arrange a full day meeting to discuss it and to receive briefings on various topics we might want more detail about.

Nelson is the project manager for the Panel. To help him to arrange the first two meetings, could you please let him know your availability for a two hour meeting next week and a close to all day meeting the week after? Many thanks.

I'm looking forward to working with you both on this important project.

Regards

Tricia

Tricia O'Malley

Mobile +1 (416) 570 1924

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image001.pdf



Email - RE_ CONFIDENTIAL - Ontario Teacher's Pension Plan (OTPP).pdf

From: [Martin, Paul \(FIN\)](#)
To: [Tam, Nelson \(TBS\)](#)
Subject: RE: CONFIDENTIAL - Ontario Teacher's Pension Plan (OTPP)
Date: November-10-16 2:56:20 PM

Thanks.

Paul

From: Tam, Nelson (TBS) [mailto:Nelson.Tam@ontario.ca]
Sent: Thursday, November 10, 2016 3:29 PM
To: Patricia O'Malley (plomalley@outlook.com); Martin, Paul (FIN); Uros Karadzic (uros.karadzic@ca.ey.com); Murray Gold (mgold@kmlaw.ca)
Subject: CONFIDENTIAL - Ontario Teacher's Pension Plan (OTPP)

Patricia, Paul, Uros, Murray

I was trying to get approval to share the draft position paper but have not been successful as yet.

Paul requested some reading material to get him up to speed. I decided to share the documents with the Panel just in case others are interested in some "light" reading.

Attached are the following all related the Ontario Teacher's Pension Plan

- Teacher's Pension Act
- Schedule 1 to the Act (Plain Text)
- Partner's Agreement
- Funding Management Policy

Also, Murray approved distribution of his comparison of the OPSEU and OTTP to BC plans. This will be in the 2nd email.

We have a limit on the size of emails.

Please let me know if you need anything else.

Thanks

Nelson
416-212-0514

Email - RE_ CONFIDENTIAL - Part 2 - Ontario Teacher's Pension Plan (OTPP).pdf

From: [Martin, Paul \(FIN\)](#)
To: [Tam, Nelson \(TBS\)](#)
Subject: RE: CONFIDENTIAL - Part 2 - Ontario Teacher's Pension Plan (OTPP)
Date: November-10-16 2:56:27 PM

Thanks again.

Paul

From: Tam, Nelson (TBS) [mailto:Nelson.Tam@ontario.ca]
Sent: Thursday, November 10, 2016 3:31 PM
To: Patricia O'Malley (plomalley@outlook.com); Martin, Paul (FIN); Uros Karadzic (uros.karadzic@ca.ey.com); Murray Gold (mgold@kmlaw.ca)
Subject: CONFIDENTIAL - Part 2 - Ontario Teacher's Pension Plan (OTPP)

Patricia, Paul, Uros, Murray

As per my previous, email. Attached is the comparison of Ontario to BC.

Thanks

Nelson
416-212-0514