



PEAK

Benefit Solutions Inc.

PEAK STRATEGIES FOR SUCCESS

Employee Engagement : Getting The VERY Best From Your Employees



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AGENDA

FOR THE DAY

- 8:00 am** Registration and continental Breakfast
- 9:00 am** JOHN LOBRAICOO - *Hiring the best personalities to fit your organization*
- 10:30 am** Comfort Break
- 10:45 am** MATTHEW SAVINO - *Performance Management and other ways to have performance evaluations that help with engagement.*
- 11:35-12:45 pm** Lunch Provided
- 12:45 pm** NANCY HAPKE - *Neuro Linguistic Programing, See it, Hear it, and do it, Training Employees.*
- 1:30 pm** Comfort Break
- 1:45-3:15 pm** RON SOUTHWARD AND JULIE EINARSON - *Workplace engagement and culture.*
- 3:15-3:30** Q & A for all panelists.



WHY PEAK BENEFIT SOLUTIONS

At Peak benefit Solutions Inc. we take a vastly different approach than many of the other group benefit consultants who just gather quotations and discuss bottom line price. We believe your plan should evolve with your changing needs and objectives. Effectively communicating the value to all members essential for success. Our process begins with a non-invasive plan audit in which we address several areas of plan efficiency and compensation optimization. During our review we address:

- Benefit plan design versus cost effectiveness
- Funding alternatives
- Tax efficiencies and payroll strategies
- Elimination of reverse discrimination
- Employee turnover
- Human Resource Management
- Corporate Policy Design and implementation

Employers are under increasing pressure to offer a benefits program that can attract and retain valuable employees. Changing legislation, new



trends and increasing costs make this a challenging task. We will help you face this challenge and manage it effectively. We utilize our broad network of resources to offer professional expertise and provide customized solutions to meet the unique needs of every client.

Our goal is to make your plan rewarding for all members by delivering quality products with excellent customer service. Whether we are designing a standard group health and dental benefit plan, an executive Health Spending Account or a group pension, we will customize your plan and streamline the implementation and ongoing processes for owners, administrators and employees. We back up our recommendations with solid execution and service.

With over 30 years of employee benefit expertise, allow the team at Peak Benefit Solutions Inc. the opportunity to be with you every step of the way as you chart your own path.



EMPLOYEE COMPENSATION Getting to Win-Win



Matt Holmes, CPA CA
Partner – BDO Canada LLP
Peterborough

At BDO we strive to provide our clients with greater opportunities to provide creative compensation plans, while ensuring tax efficiency for both the company and the employee. Our tax specialists can assist you with reviewing options for your employees and executives, provide analysis of the overall cost impact to your company while maximizing net after tax return for employees.

BDO CAN ASSIST BY:

- Reviewing compensation plans and making recommendations for improving tax efficiency
- Providing alternatives for owner manager employees to help them improve cash flow
- Establishing creative solutions for the purpose of retaining key employees.

Matt can be reached at 705-742-4271 or by email at mholmes@bdo.ca



FOX LAW PROFESSIONAL CORPORATION

For over 40 years, Bill Fox has provided his clients with advice and guidance on a variety of business law issues, including incorporations, corporate reorganizations, acquisitions and financing.

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Fox Law has grown over the past year, with the addition of two new lawyers to the firm – Ross Pryde and Nicole Truman, the acquisition of a retiring lawyer's practice and a move to expanded office space to better serve the firm's clients.

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Andrew Galvin, Broker



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JOHN LOBRAICO

HIRING THE BEST PERSONALITIES
TO FIT YOUR ORGANIZATION

A graduate of the University of Western Ontario, John has been a certified PI[®] Analyst since 2001, and is a certified PI Facilitator and Customer-Focused Selling[™] (CFS) Facilitator. John spent 25 years in family business as both an owner and manager of one of Canada's largest regional transportation companies.

He is a seasoned business leader with a strong background in family run organizations. John specializes in working with family business and entrepreneurs desiring to improve their organizations and their top and bottom line. For owners and professional managers, John's involvement provides the structure and support to improve execution and create an environment of accountability. His clients see John as an "outside agent for change and growth", and his hands-on approach and experience increase the likelihood of lasting results.

SESSION TOPICS INCLUDE:

1. Creating role clarity
2. The importance of the hiring manager
3. Looking at the whole person
4. Transition from hiring to development
5. The keys to retention



MATTHEW SAVINO

PERFORMANCE MANAGEMENT
AND OTHER WAYS TO HELP WITH
EMPLOYEE ENGAGEMENT

Matthew Savino is the Managing Partner of SHRP Limited, a Management and Human Resources Consulting firm based north of Toronto in Peterborough, Ontario with clients across North America. He has 20 years of progressive Business and Human Resources experience as a Director and Vice-President of Human Resources in a number of Canadian and International companies. Matthew holds degrees in Economics (B.A.) and Law (LL.B.) as well as certificates in Dispute Resolution & Mediation, and is a certified Leadership Development Trainer.

He is a member of the Human Resources Professionals Association of Ontario (HRPA) and is one of a small number of Practitioners currently certified as a Certified Human Resources Executive (CHRE) by that Association. He acts as an HR Advisor to, and is also a member of, a small number of Boards of Directors and has acted as Adjunct Professor at the University level. More information about SHRP can be found at www.savinohrp.ca

SESSION TOPICS INCLUDE:

- Employee Performance Development
- Create an engaging Performance Appraisal / Evaluation system for your staff
- Employee Engagement and Motivation Strategies
- Improve your ability to communicate effectively with staff to deliver constructive feedback and set goals



NANCY HAPKE

SEE IT, HEAR IT, DO IT

With over 20-years in the training industry, Nancy von Hapke president of 3D Training and Marketing Inc. applies her expertise to design, develop and deliver customized training products for corporations infusing adult learning principles with creative and interactive delivery methods.

3D specializes in Business and Retail Sales, Contact Centre Solutions, Customer Service and Management training divisions and has provided training solutions nationally to numerous corporations in various industries, which include Telecommunications, Banking, Insurance, Retail, Entertainment and Finance.

The 3D team evaluates the needs of the client, and develops a complete curriculum of customized training products that enables their clients to exceed their business goals and improve overall company performance.

SESSION TOPICS INCLUDE:

- “Neuro Linguistic Programming: See it, Hear it, Do it; Training employees. Our communication style reflects the way we think, so understanding how someone thinks helps us improve our communication
- Evaluate our personal communication style
- Review all 3 communication styles and understand the differences between them
- Learn how to adapt your style and incorporate others to broaden overall communication



RON JULIE SOUTHWARD & EINARSON

WORKPLACE ENGAGEMENT AND CULTURE

Ron Southward is a Managing Partner of Benefits by Design (BBD) Inc. He has been in the insurance industry for over 40 years, and has a unique skill in finding talented people then figuring out the best way for them to showcase their talent. This is a skill he applies to meet the number one goal of BBD: GROWTH.

As BBD's Director of Culture and Communications, Julie Einarson connects internal culture with external brand, and people with information to guide decisions and inspire growth. With a background in higher education and human resources, Julie's energy comes from seeing people learn, helping companies grow, and building communities that thrive.

BBD is an Administered Benefits Agency that works in partnership with independent financial advisors to provide employee benefit programs to over 4,000 companies across Canada. BBD's technology solutions support good health and drive growth for Canadian workplaces, and the company is made up of 90 employees based in Kingston, Vancouver, and Toronto. BBD focuses on developing relationships while providing excellent service, and their commitment to putting people first has led to repeated recognition as a Great Place to Work and Best Small- to Medium-Employer.

SESSION TOPICS INCLUDE:

- The Three Keys.
- Workplace Engagement.
- Q&A.



PEAK

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