



CELEBRATING

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OUR PAST



A History of the International  
Pension and Employee  
Benefits Lawyers Association

# C E L E B R A T I N G

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## OUR PAST

### Remembering the Past, Planning for the Future

The founding of IPEBLA revolved around a Hobson's choice. Tony Thurnham (Chair, 1987–91) recalled, "I had to become a salesman, an actuary, or a solicitor." Starting in a position as a pensions technician for a large UK insurance company, there really was no choice for Tony. He became a lawyer.

Although Tony claims he wasn't much of a joiner early in his career, his need to stay informed of the latest international pension trends surpassed his need to maintain his status as a loner. After qualifying as a lawyer and beginning his legal career at a global law firm, LinkLaters, Tony began to find his niche in pension law. "In many ways, I'm not much of a joiner. It's impossible to [start an organization] without being joiner." Tony soon found his professional development home in the newly formed United Kingdom's Association of Pension Lawyers (APL).

Responding to the needs of the vast array of cross-border mergers and acquisitions, Tony thought, "it was terribly important to understand the basics of other countries' [pension] structures and [to] get to know benefits lawyers in other countries so that you met people you could work with. I wanted to meet people and wanted more information to give our clients."

But he couldn't do it alone. "Tony's broad theory was that since we were all practicing, we would all benefit from getting together, sharing ideas, and sharing legal precedent with respect to our home jurisdictions," Ian McSweeney (Chair 1995–97) noted. "It made perfect sense to broaden the scope of our knowledge to the international scene."

To broaden the scope of knowledge, Tony began building a network of individuals and groups that complemented the mission. "We were actually starting completely from scratch, but effectively, what I managed to do was to find some different groups that didn't necessarily overlap and get them talking to each other," Tony remembered. The international insurance law association, Association Internationale de Droit des Assurances (AIDA), and the APL became the first major players in the nascent stages of IPEBLA's creation.

Building on the cooperation of those two organizations, Tony decided to continue his quest to find the relevant people who could contribute to the pension dialogue. "I decided I would take a couple of weeks in the States. I talked to benefits lawyers to see if it would give me any greater knowledge. I got names of various lawyers and contacts." Then, Tony went to AIDA's World Congress in Budapest and reported back to his contacts. "I dropped a line to some of the US and Canadian people and mentioned that I met these [AIDA members] and it was terribly interesting." With the hope of starting an international organization solely dedicated to pension and benefits law, Tony's enthusiasm attracted the right people to share and expand on his vision.

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### *July 1987 London, England*

IPEBLA didn't come into existence over night. Tony's idea needed the right partners to grow into a living, breathing organization. The British chapter of AIDA, the British Insurance Lawyers Association (BILA), along with the APL helped Tony organize the first pre-IPEBLA meeting in London in 1987. Because Tony had consulted with the appropriate network of professionals, he knew that there was interest in attending an event that was geared toward international pension law, but there was no guarantee anyone would actually attend a conference. He just had to take a chance and invite people. "We just called it an international pension law conference and we wrote to everyone we knew to spread the word. It worked!" Tony reported. About 40-50 people attended. BILA had the first half of the week and the soon-to-be-called IPEBLA had the second half of the week.

The attendees of the London conference were grateful for the opportunity to meet other pension lawyers and discuss international pension issues. "I couldn't find anybody who was doing the same type of work I did. Then, the London conference was set up," Marianne von Cooverden (Chair 1993–95) said. "There were all these other professional conferences where clients and potential clients would be in the same room as the lawyers and we didn't want that. We wanted a setting without possible clients where we could ask questions."

Wanting to ensure both quality of content and interaction, the London meeting focused mainly on a workshop-type model for discussion. "We were following a model of striking a topic and inviting several speakers and then opening it up for audience discussion. The speakers ended up presenting the bones and before you knew it you were involved in a multijurisdictional discussion. I've never experienced anything like that before," Ian McSweeney (Chair 1995–97) reminisced. The interactive nature of the London meeting set it apart from other law conferences where the information was passively presented for attendee consumption. At the London meeting, people were contributing and receiving information in equal measure.

The most notable thing about that conference was the congeniality of the attendees, but second to that was the heat. Held in a large classroom at University College London, "it was a brutally hot couple of weeks in London and University College was not air conditioned... it was brutal!" Ian McSweeney remembered. "I think what stands out in my mind is the sophisticated level, the great dialogue, the absence of using the committee to drone on, the willingness to embrace discussion, and getting an opportunity after to just socialize during the evening."

Pleased with the content and structure of the London meeting, the attendees wanted to continue the dialogue. In spite of the heat, "5 or 6 of us said we should continue this and have an organization. We just decided we wanted to continue the conversation," Susan Serota (Chair 1993–95) mentioned. During the London meeting, "we made three decisions. We decided to have another conference in two years time, we decided to set up some kind of rudimentary newsletter [later to become the International Pension Lawyer] and we set up a steering committee to steer a course towards an association," Tony fondly recalled.

"We wouldn't be here today without Tony. He was a leader, he was someone who pulled people together, but he was very much the life of the party socially and he made learning and thinking fun." Ian McSweeney said, "He was the organization—it wouldn't have survived even after its first conferences without him. He was the father of the organization in every sense of the word."

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No longer able to claim he wasn't a joiner, Tony used his vision to ensure that the international pension dialogue was ongoing. The decisions to meet again in two years, start a newsletter, and create a committee to steer the group towards a legitimate organization, put the fledgling group on the right track.

### *May 1989 Apeldoorn, Netherlands*

The London conference left the attendees buzzing with the possibilities of an evolving organization. "We were grappling with not only the good idea of getting together and exchanging ideas, but we were grappling with how to structure ourselves and where we were going to be based, funding, etc. All those issues were the nuts and bolts to get started," Ian recollected. Deciding to showcase the group as an international organization, the group decided to incorporate as a non-profit in the Netherlands to signal that this group was not just for British, Canadian, and American pension lawyers. "[Incorporating in the Netherlands] was a signal that it was continental," Jim Klein (Chair 1991–93) said. Both "pension" and "employee benefits" was included in the name because it was important to let people know that the group was both topics.

Faced with the challenges of funding for the next conference and developing membership, Tony's faith was placed in Pieter de Lange of Centraal Beheer Achmea, the largest insurer in the Netherlands. Luckily, Centraal Beheer Achmea underwrote the next conference held in 1989 in Apeldoorn, Netherlands, the insurer's headquarters. It was there that Pieter de Lange's daughter, Henriette, got bitten with the pension law bug. Her father noted, "The nice thing, our daughter Henrietta, she had just had her examination of middle school. She was behind the desk in Apeldoorn—she helped us organize." Henriette went on to become a pensions lawyer and a valued member of IPEBLA.

Tony was pleased about the collegiality of the group and how other pension and benefits lawyers interacted without being antagonistic. He was most pleased to see how people from different jurisdictions were mixing. The collegiality paired with the wonderful landscape made the conference popular both professionally and socially. Notably, the attendees were treated to a grand reception and formal dinner at the Palace Het Loo in Apeldoorn where the members enjoyed an opulent palace. Thanks to the help of Centraal Beheer Achmea and Pieter de Lange, the first official IPEBLA conference was a great success.

The achievement of the meeting in Apeldoorn encouraged the IPEBLA to continue to develop as an organization. The "big picture" things were there—members, people showing up to conferences, but they needed more resources and infrastructure to continue to build. After the Apeldoorn conference, the group decided, "from now on, we are going to have to figure out pricing so we can have reserves. We're going to have bank accounts and hold money and finance the magazine. We had to get the journal out to convince people we were a real organization," Jim Klein recalled. This sowed the seeds for what was to become the IPEBLA journal, which is more formally named the "International Pension Lawyer".

Jim remembered during that time, "we started the off-year meetings. We wanted to increase the momentum. We would circulate contact lists from the members of the steering committee [to invite people to join us.]" The steering committee's strategic vision of an international pension lawyers association was coming to fruition.

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### ***June 1991 Cascais, Portugal***

Cascais, a resort town up the coast from Lisbon, Portugal was home to the 1991 IPEBLA conference, the first truly independent conference. Always keeping the setting interesting, IPEBLA members chose a Hilton conference center that sat atop Roman ruins. Cascais had a solid 90-person turnout—nearly double that of the London meeting. Clearly, the success of London and Apeldoorn were enticing other pension lawyers across the world to join.

Prior to the Cascais conference, Jim invited David W. Ellis (Chair 1997-99) a colleague of his from the American Bar Association's Employee Benefits Committee. David said his great excitement to be with other pension and employee benefits attorneys was, to him, surprisingly matched by the other members. He didn't realize the others would share in his excitement. Upon his arrival, the other IPEBLA members were already having cocktails by the pool and invited him into conversation with ease. Setting the tone for the conference, the IPEBLA members "got down to a lot of granular detail," but "at the end of the day, you went out to dinner, you had cocktails, you had fun, you became friends," David reminisced.

During this time, steering committee realized that it would be difficult to justify attendance to your firm unless you wrote a paper and presented it. At that time, members were required to write a paper and if they missed the deadline, they had to bring copies themselves. Making for a very heavy suitcase, many tried to avoid any late paper submissions, but it still happened from time to time. With the need to keep attendance up, IPEBLA invited nearly everyone to be on a panel. This not only embedded the participative style of an IPEBLA conference, but also served to provide an added justification for attendance.

"We had ten people on the panel and I remember I almost didn't get a seat at the table. The table wasn't long enough for all of us," David remembered. The Cascais conference was just the beginning for David, as he would go on to become steering committee chair. "I met some amazing people through IPEBLA and attracted quality friends to the point where I would get Christmas cards. This was a close-knit group of people."

As IPEBLA's membership began to grow, it started to become an educational beacon for other professionals and organizations tasked with improving pension and benefits policy. Marianne von Cooverden recalled, "At that time, the European Union was starting to look into pensions and they thought it would be helpful for them to consult with us. Their representatives told us what topics would be helpful, so we presented that information at the Cascais conference, and they sent a keynote speaker."

After the Cascais conference the IPEBLA was going through a new phase. With the foundation cemented, the members focused on expanding membership, developing the newsletter, and gaining exposure.

### ***June 1993 Budapest, Hungary***

The success of the Cascais conference created momentum for the 1993 conference in Budapest. Governments continued to seek IPEBLA's conferences for much needed information about pension and employee benefits. Marianne von Cooverden recalled, "At the Budapest conference, it was very interesting because there was a new government that was tasked with setting up the first pillar arrangement for widows and mothers—I remember sitting next to the minister of social affairs. The conference helped him to understand the world of pensions in a very short time."

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The early arrivals to the conference enjoyed a wonderful minibus tour arranged by Jonathan Seres (Chair 2011–13) and Rick Menson. During the conference, the IPEBLA members were treated to a wonderful night at the opera, seeing Richard Strauss's *Midori*. Continuing the festivities, Janet Downing (Chair 2001–03) recalled on the last day of the Budapest conference, "there was a big hotel patio that overlooked the Danube and a Swiss Air crew showed up with a case of champagne." Always willing to socialize, IPEBLA members made the most of their short time together once every two years.

### ***June 1995 Vancouver, Canada***

IPEBLA members attended the Vancouver conference with heavy hearts. Founding member and Australian pension lawyer, Libby Slater, had passed away. Only in her late 30s, Libby's death was tragic. "When Libby walked in just after the London conference, she walked in Bermuda shorts and a sleeveless top. We just sort of looked at her and we loved her. A lovely lady and a very bright lawyer," close friend Susan Serota recalled. Anne Corbett remembered, "Susan gave a very powerful personal tribute and read the letters of other IPEBLA members to each other about Libby's passing, many of which recounted their last meetings with Libby." Anne was touched by the compassion and strong personal bonds she witnessed between members. IPEBLA memorialized Libby's impact on the group by instituting the Libby Slater Award. This honor gives people the chance to come to a biennial conference who have made or are making an outstanding contribution to pensions law and who might not otherwise be able to attend the next IPEBLA conference.

Besides the heartbreak, "Vancouver was a very successful conference. The location made it successful. We had great weather. It was beautiful. Because we were on the west coast we had a higher Asian draw and we had lawyers from Japan who joined us for the first time," Ian McSweeney remembered. Naturally, for Marianne von Cooverden, the Vancouver conference was her favorite. "The city of Vancouver comes from my family name. There's one member of my family who wasn't very successful, so he was sent to the Scottish army to serve in Vancouver. He was buried there. There was a bicentennial in Vancouver and my parents were invited. It was wonderful." Vancouver's rich history was a powerful backdrop for the biennial meeting.

Treated to singing and dancing lumberjacks juggling chain saws at a restaurant atop Vancouver's Grouse Mountain, the IPEBLA members' relationships were strengthened by sharing in yet another unique experience.

### ***June 1997 Barcelona, Spain***

After the Vancouver conference, IPEBLA was even more committed to marketing itself as the thought leader in international pension law and employee benefits. At this point in time, the biggest task facing IPEBLA was making sure that the organization was professionally run. Increasing membership and trying to maintain the culture of an intimate educational exchange was challenging. "The biggest thing for us was we wanted IPEBLA membership to be as big as possible, but we didn't want the conference to get too big. We were worried that they would get so big that we couldn't have meaningful exchange. We were mindful of the marketing aspects and we didn't want it to become a schmoozing venue if that would sacrifice the legal educational benefits. Even though it is obviously a networking opportunity we were trying to preserve the culture," Ian McSweeney said. During this time, IPEBLA created their website to both raise their international profile and attract talented attorneys in the field. Excited to have the public face, IPEBLA created the foundation for what the website is today.

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Barcelona was Tom Jorgenson's (Chair 2007–09) first conference. "I was just so excited hearing about other people around the world with their different issues and languages. They were all speaking English, but a lot of them used words in ways that did not jive with the English vocabulary, which was very interesting." Welcoming the nuances of the pension and employee benefits nomenclature, the group was able to use diversity as a tool to strengthen each other's understanding.

### ***May 1999 Florence, Italy***

From 1997 to 1999, IPEBLA was in the process of modernizing and hired a third-party organization to act as an executive administrator. Before that, "we really had a volunteer organization—the only time something got done was when someone's law firm picked up the tab. Our newsletter, the International Pension Lawyer was put out by [my firm] Baker and McKenzie. Their service department printed it and paid for postage," said David Ellis. To address this issue, the organization hired Maryland-based organizing company International Meetings Incorporated to help in the day-to-day operations and conference planning.

For David, the Florence conference was memorable for both good and bad reasons. David had surgery prior to the conference due to a herniated disk and when he arrived in a hard collared neck brace people were shocked. He remembered thinking, "I don't care how I look, I'm just so damn glad to be here." Certainly, IPEBLA members' concern and care for David eased his discomfort.

Randy Bauslaugh (Chair 2009–11) had an eye-opening first conference in Florence. Over lunch, he collaborated with other IPEBLA members to find a solution for his client that made him look like a hero. "I don't know if I would have stumbled upon that idea without IPEBLA," he said. "The lunch in 1999, IPEBLA stopped being a boondoggle and became a real useful tool in my progress. A big insight."

After the biennial conference in Florence, Louis Kuypers (Chair 1999–2001) recalled, "We went to Madrid for a session to discuss what to do in the next two years and there we decided to go to Vienna, but at that time there was a new political party that came into force. We were forced to change our plans at the last moment and we decided to go to Bordeaux." This decision proved to be a very positive one, as many steering committee chairs said this was their favorite biennial conference.

### ***June 2001 Bordeaux, France***

Bordeaux turned out to be a wonderful site for the 2001 biennial IPEBLA conference. The conference center, La Cite Mondiale, created a contrast between the relaxed countryside and the modern conference site. Jonathan Seres recalled Bordeaux as his favorite conference. "Bordeaux was my most memorable because the city itself has amazing history. It has some amazing 17th century classical architecture and they built an amazing modern conference center. I took time out to take the train to some rural areas which were totally different." IPEBLA members had the pleasure of visiting vineyards in the countryside and enjoying some meals in their production facilities.

Marianne von Cooverden also had wonderful memories of Bordeaux. "Bordeaux was in a way my most memorable conference experience because when everybody was just arriving one or two days before the conference, we were sitting on terraces and saw more and more people we knew passing by. It felt as if a whole family gathered there."

Chair during some very challenging times, Janet Downing mentioned that the IPEBLA, like the rest of the world, experienced difficulties organizing and communicating due to September 11th. Bjorn Dannberg (Chair 2003–05) recalled not knowing whether people would be willing to get on a plane again to attend

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a conference. The steering and conference committees decided to press on. To plan the San Diego conference, the planning committee went to Munich. “It was a month after 9/11. We were on a Lufthansa flight and I swear there were twenty-five people and an air marshal on that plane.” Being an international organization was challenging during that time, but with time tensions eased and IPEBLA was able to continue fulfilling its vision of providing pension and employee benefits lawyers an open international forum.

The Bordeaux conference also witnessed the conferral of the inaugural Tony Thurnham Award (on Michel Benoit and Josee Dumoulin) To honour Tony’s “founding father” status, the award is made for the article in the "International Pension Lawyer" over the two-year period between IPEBLA conferences considered to be the best article published during the two year period.

### ***June 2003 San Diego, USA***

South African pension lawyer, Jonathan Mort, attended his first IPEBLA conference in San Diego. “I loved the collegiality of it. Other groups of lawyers were very competitive, but [the IPEBLA conference] was just a wonderful environment and we all had this passion. We could share and debate without worry of competition,” he recalled. Bjorn Dannberg remembered enjoying the San Diego conference even though many of the North American IPEBLA members were jokingly disappointed by not being able to travel to Europe for a conference. In San Diego, members were treated to cocktail hour overlooking the Pacific Ocean, as well as a gala dinner at the Prado in the famous Balboa Park.

Philip Bennett (Chair 2003–05) said, “We spent 2003–2005 doing two things: one, encouraging membership and two, making sure that the conference that followed San Diego was well supported.”

Part of enhancing membership was making the benefits more accessible. IPEBLA started having teleconferences as a way for members to connect without getting on a plane and flying thousands of miles. Tom Jorgenson said, “that was very successful and exciting because it gave a way for members to interact with the organization that they never had before.” Philip Bennett added, “the teleconferences were a great meeting of minds and a great way to keep people involved.”

IPEBLA also instituted the policy of reimbursing some members who could otherwise not attend in addition to the Libby Slater Award. IPEBLA wanted to expand membership to practitioners from different professional backgrounds. “We got the membership to start reimbursing those members who couldn’t come to the conferences because of finances. We had to propose that to the steering committee and we had come up with something that was proportionate and affordable,” Philip Bennett noted. This expanded membership made the biennial conferences more accessible to a diverse group of people.

### ***May 2005 Vienna, Austria***

Founding member Bjorn Dannberg wanted to do something special for the 10th biennial conference. In spite of the challenges of raising the capital to facilitate the jubilee, Bjorn recalled how it was all worth it because, “the IPEBLA [conference] is not just an ordinary conference some big firms are running. There are some commercial aspects, but generally, members get together, write papers, and don’t get paid.” Billed as IPEBLA’s jubilee, the conference and steering committees didn’t disappoint.

Having previously passed-over Vienna, Louis Kuypers remembered, “The political party that prevented us from going there for the 2001 conference had not been re-elected so there was no reason not to go there.” Louis fondly recalled being taken from the conference hotel in horse drawn carriages to dinner.

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“We were greeted by trumpeters playing Edelweiss,” he reminisced. Dining at the castle of a duke, the real highlight of the conference was “the generosity of spirit of those on the committee in sharing that time and their knowledge.”

### *May 2007 Seville, Spain*

In Seville, the seeds for an international comparative survey were sown. IPEBLA member and South African pension lawyer, Jonathan Mort, said, “in the first couple of conferences, it appeared to me that much of the sessions were dedicated to show and tell with their own country. I thought it would be much more helpful, for the development of certain universal issues to be described in a book and work out what those were and then to ask all those pension lawyers to just give a brief description.” This thought turned out to be the genesis of the comparative survey. Bringing Lisa Butler Beatty (Australia) and Carsten Kjellerup (Denmark) on board to form an editorial team (with Jonathan), the next two years engendered much thoughtful, rigorous and stimulating debate, which now underlies the structure and content of what was to become the Comparative Survey.

IPEBLA members enjoyed the hotel—a converted palace. Randy Bauslaugh recalled going out until midnight with other IPEBLA members. “I had to explain to my partners about having to travel so far for a pension and employee benefits conference—once you’re there, you really get to know these people,” he said. Ian McSweeney remembered a long bus drive to Bodegas Gongora in the Vilanueva del Arístal, a wonderful vineyard that had been run by the same family for generations. IPEBLA members were treated to a wonderful sherry tasting and flamenco dancing.

### *May 2009 Athens, Greece*

Tom Jorgenson recalled, “The biggest achievement of the 2009 conference in Athens was that we delivered to the members the first edition of international pension law survey. This effort was probably three or four years in discussion. We brought it to publication and were able to distribute it to attendees and then mail it out to the other members who did not attend.” Formally termed “A Comparative Survey of Pension Law Issues” it is a unique publication as a useful tool for IPEBLA members and many others who need information about private pensions in other parts of the world than their own. The Survey was intended to develop legal thought around issues in pension provision, focusing on the similarities and differences between jurisdictions.

During the Athens conference the steering committee debated whether the organization should host annual conferences in lieu of biennial conferences. This would have the effect of switching the registration fees to annual fees. “The timing was bad in 2009 because it was the heavy point of the recession,” Tom said. The committee decided to maintain the biennial conference schedule, but to continue to ramp-up the off-year conferences. Originally, the off-year meeting only included the steering and conference committees and lacked content, but in 2008 IPEBLA had joined forces with the American Bar Association’s Tax Section’s Employee Benefits Committee in Washington, D.C. As part of this effort to make the organization more accessible, IPEBLA also launched an online discussion forum in 2010. “It was all part of the drive to show the organization wasn’t all paper driven,” Jonathan Seres said.

To further this step towards a less paper driven future, Lisa Butler Beatty (a steering committee member with responsibility for the Journal) commented that “Leanne Van Wyk (the then Journal editor) and I developed plans for an online edition of the IPEBLA Journal. While the paper edition looked great, printing costs and mail out times of up to three-four weeks meant that increasingly it was difficult to

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justify a pure paper based system.” Following the Athens conference the first electronic journal was introduced in November 2010. While the paper and electronic journals ran in tandem for a time, it wasn’t long before the ease and accessibility of the electronic journal took hold as the dominant communication forum for the future.

### ***June 2010 – Joint Conference – Quebec City, Canada***

Picturesque Quebec City with the towering Château Frontenac Hotel was the perfect venue for the first official joint conference. Randy Bauslaugh commented that “the first fully integrated partnership to present the joint IPEBLA-Canadian Bar Association conference in Quebec City was a great success on all counts with over 165 delegates, about a third of whom were IPEBLA members from outside of Canada”. The results and feedback suggested that the integrated joint programming worked well, especially with an enthusiastic team working on it. Randy noted “we were also grateful to the Canadian Bar Association who made the vision of working together to produce a joint conference come together brilliantly”. This joint conference laid the foundation for the more formalised joint conferences that were to come.

### ***May 2011 Berlin, Germany***

The 2011 biennial conference in Berlin marked the release of the second edition of the comparative survey. The second edition of the survey had more contributions from different jurisdictions, especially those from developing economies. Serving as a further step towards the development of international pension debate, the survey made the approaches of different jurisdictions more accessible.

As Conference Chair Brian Buggy remarked that “that the international nature of the IPEBLA organisation and the positive impact of technology on our working lives were both evident in the keynote address which was given by our speaker Gautam Bhardwaj via Skype from his offices in New Delhi India.” A keynote via Skype was certainly a first for IPEBLA.

Brian further reflected that the “conference hotel was ideally located in the centre of Berlin which has been wonderfully redeveloped following the fall of the Berlin wall.” Added to this members were treated to an impressive conference gala dinner atop the Reichstag.

### ***April 2012 – Joint Conference – Montego Bay, Jamaica***

The second integrated joint conference took a big step forward in partnering with colleagues in another profession, namely the Caribbean Actuarial Association and the International Association of Actuaries. The main themes centered on retirement income security in developing countries, pension regulation in a multi-jurisdictional environment, and pension protection. Holding the conference in Jamaica made it accessible for many delegates who might not otherwise have been able to attend, particularly those from the Caribbean region. The interaction with the actuarial profession added depth and breadth to workshop discussions. It also generated enthusiasm among IPEBLA members for holding more joint sessions with the actuarial and other professions engaged in the pensions and benefits industry. Despite concerns about holding a conference at a resort destination, the conference was a great success as measured by all of the usual metrics, but particularly in terms of attendance, diversity, and professional interaction.

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### ***May 2013 Rome, Italy***

The 2013 biennial IPEBLA conference was in the city of visual history, Rome. “Mitch Frazer and I both felt that the venue with its combination of world class city and world class history plus tourist class sunshine would ensure we had large numbers attending. We knew that the IPEBLA had the expertise to make it a great professional conference. It was outstanding in that choice of city produced over 160 attendees, the most of any IPEBLA conference,” Jonathan Seres said. The group was treated to a gala dinner Casina Valadier where they had a wonderful view of the city and enjoyed eating and chatting into the evening.

### ***Joint Conference – June 2014 – Chicago, USA***

The historic Drake Hotel on Chicago’s Magnificent Mile was the setting for first joint conference between the Canadian Bar Association, the American Bar Association Joint Committee on Employee Benefits, and IPEBLA. Members of all three groups participated enthusiastically, with a speaker from the USA, a speaker from Canada and a speaker from outside North America for every workshop. Keynote speakers highlighted the insurance systems for pension programs around the world and a comparison of the pension plans common in a variety of jurisdictions, reflecting the conference theme of “Benefits without Borders.” Carol Weiser, a co-chair, commented “it was wonderful to see the payoff on all of our planning, which involved a true collaborative process between the three organizations.” Carol also noted that a number of attendees described the conference as one of the best they had ever attended.

The joint conference also provided a forum for the release of the third edition of “A Comparative Survey of Pension Law Issues.” The third edition included a total of 28 contributions covering major jurisdictions around the world, with the Survey running to 380 pages (a third longer than the second edition).

Significantly, the Survey was published in both hard copy and, for the first time, as an interactive CD permitting readers to more readily find information relevant to a particular issue throughout the various jurisdictions of interest.

### ***May 2015 Brussels, Belgium***

The 2015 IPEBLA Biennial Conference hosted another record number of delegates. Under the theme of “Changing Times, Changing Benefits”, the conference had nearly 100 speakers, with 20 participating countries. There were also 29 first-time attendees, a promising number as the Steering Committee looks towards bringing in non-represented jurisdictions into the organization as well as a younger demographic. This year also had exciting social programming, including a pre-conference tour to Bruges and Ghent and evenings spent at Le Chalet Robinson and Chateau de Grand Brigard. Conference Chair, Jana Steele, reflected that “Brussels was a fantastic venue for IPEBLA – accessible and beautiful. The closing dinner at the Chateau de Grand Brigard was especially memorable with the trumpeter and other outdoor entertainment as we approached the grand venue. We were so thrilled this year to have so many first time attendees, including some from previously unrepresented countries. As always, the quality of the plenaries and seminars was outstanding, as were the post-session chats!” Mitch Frazer, steering committee chair, also said “delegates from around the world gathered to discuss their common issues and exchange helpful ideas. Overall, the Brussels conference was another in the long line of excellent conferences organized by IPEBLA!”

***Final Reflections - Remembering the Past, Planning for the Future***

Among all the positive things past chairs had to say about IPEBLA, Marianne von Cooverden may have said it best when she stated, "IPEBLA has given my professional life a glow." Ian McSweeney remembered the laughter above all else. "This was a group that really liked each other. Everybody who went to these conferences liked each other. We looked forward to getting together, everyone was pretty high-powered and the level of camaraderie was unprecedented. Everybody did their share and everyone was very generous with their time and ideas and social aspect. The technical and content aspects were mirrored by the social aspect. It was amazing."

IPEBLA's mission and collegiality is being continued by current steering committee chair, Mitch Frazer. "My general theme is preparing for the future, while remembering the past. It's a bridge between the two. I want to make sure we look at IPEBLA's history, but at the same time, we are in a position where technology is changing rapidly and we want to be relevant to future members. My tenure is that link." IPEBLA's strong and varied history is the foundation for what's to come.

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### Steering Committee Chairs

2015-2017

Dr. Lisa Butler Beatty  
Senior Legal Counsel  
Commonwealth Bank of Australia

2013-2015

Mitch Frazer  
Partner  
Torys LLP

2011-2013

Jonathan Seres  
Retired Partner  
Sacker & Partners LLP/Solicitors

2009-2011

Randy Bauslaugh  
Partner  
McCarthy Tétrault LLP

2007-2009

Thomas Jorgensen  
Partner  
Calfee, Halter & Griswold LLP

2005-2007

Philip Bennett  
Partner  
Slaughter and May

2003-2005

Bjorn Dannberg  
Head of Legal Department  
KPA Pension

2001-2003

Janet G. Downing  
Lawyer & Consultant  
Watson & Wyatt Worldwide

1999-2001

Louis C. M. Kuypers  
Partner  
Houthoff Buruma

1997-1999

David W. Ellis  
Partner  
Baker & McKenzie

1995-1997

Ian J. F. McSweeney  
Partner  
Osler, Hoskin & Harcourt, LLP

1993-1995

Marianne H. van Coeverden  
Judge  
District Court of Justice - The Hague

Susan Serota

Partner  
Pillsbury, Winthrop, LLC

1991-1993

James P. Klein  
Partner  
Deloitte & Touche

1987-1991

Tony Thurnham  
Partner,  
Linklaters LLP

### Biennial Conferences

May 2015, Brussels, Belgium  
Chair Jana Steele

May 2013 Rome, Italy  
Chair Mitch Frazer

May 2011 Berlin, Germany  
Chair Brian Buggy

May 2009 Athens, Greece  
Chair Kees-Pieter Dekker

May 2007 Seville, Spain  
Chair Jonathan Mort

May 2005 Vienna, Austria  
Chair Randy Bauslaugh

June 2003 San Diego, USA  
Chair Tom Jorgensen

June 2001 Bordeaux, France  
Co-Chairs Anne Corbett & Belinda Benney

May 1999 Florence, Italy  
Co-Chairs Anne Corbett & Dona Campbell

June 1997 Barcelona, Spain  
Co-chairs Janet Downing and Tony Thurnham

June 1995 Vancouver, Canada  
Chair: Ian McSweeney

June 1993 Budapest, Hungary  
Chair Ian McSweeney

# C E L E B R A T I N G

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## OUR PAST

June 1991 Cascais, Portugal  
Chair Susan Serota

May 1989 Apeldoorn, Netherlands  
Chair Pieter de Lange

July 1987 London, England  
Chair Tony Thurnham

### Joint Conferences

2016 St. John's, Canada in partnership with the International Actuarial Association

2014 Chicago, U.S.A. in partnership with the Canadian Bar Association & the American Bar Association

2012 Montego Bay, Jamaica in partnership with the Caribbean Actuarial Association

2010 Quebec City, Canada in partnership with the Canadian Bar Association

2008 Washington, U.S.A in partnership with the American Bar Association

2006 Dublin, Ireland in partnership with the Association of Pension Lawyers in Ireland

2004 London, UK in partnership with the UK Association of Pension Lawyers

2002 Amsterdam, Netherlands in conjunction with the celebrations to honour Pieter de Lange's long tenure in the pension profession

2000 London, UK in partnership with the American Bar Association & the UK Association of Pension Lawyers

1998 Toronto, Canada in partnership with the American Bar Association

### Journal Editors

2011-Present: Dr Lisa Butler Beatty

2005-2011: Leanne van Wyk

2001-2005: Karen Mumgaard

1998-2001: Sheryl Smolkin

Prior to 1998:

David Ellis  
Mark Grant  
John Cunliffe  
Jim Klien

### Comparative Survey Editors

2013/14

Jonathan Mort  
Dr Lisa Butler Beatty

2011

Jonathan Mort  
Dr. Lisa Butler Beatty

2009

Jonathan Mort  
Dr. Lisa Butler  
Carsten Kjellerup

### Libby Slater Award Winners

2015: Paul Owens, Canada

2013: Grace Zulu, Zambia

2011: Jeremy Cooper, Australia

2009: Deborah McPhail, Canada

2007: Jan-Mikael Bexhed, Sweden

2005: William Bortz, U.S.A.

2003: Lisa Butler, Australia

2001: Professor John Murphy (South Africa)

### Tony Thurman Award Winners

2015: Jonathan Mort, South Africa

2013: Greg Winfield & Mark Firman, Canada

2011: Graham Wheeler, Ireland

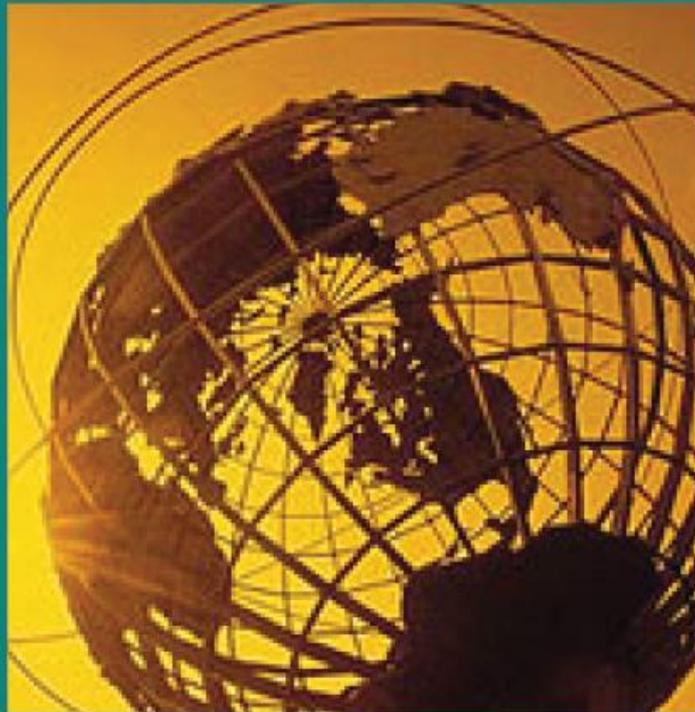
2009: Caroline Helbrunner & Jessica Bullock, Canada

2007: Howard Pianko,

2005: Malcolm Wallis, South Africa

2003: Mike Woodbury & David Cochrane, New Zealand

2001 (inaugural): Michel Benoit & Josée Dumoulin, Canada



I N T E R N A T I O N A L

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**Pension and Employee Benefits  
Lawyers Association**