

Celebrating 20 Years of Excellence

OPTrust has come a long way in 20 years. In just two decades, the Plan and the organization that supports it have grown from modest beginnings to become one of Canada's top public sector pension plans. OPTrust at twenty is a sophisticated global investor, a leader in service excellence and one of a select group of pension plans that is fully funded.

As you can see, we've had major achievements in the last 20 years. And we've never lost sight of our primary goal — to pay pensions today and preserve them for tomorrow. In other words, our 86,000 members can count on us for a predictable, steady stream of retirement income for the rest of their lives.

OPTRUST 2015 YEARS

OPTrust celebrates its 20th anniversary with more than 86,000 members and retirees and \$17.5 billion in net assets

1995



Operations commence on January 1, 1995 following an agreement by the Ontario Government and OPSEU to establish a separate, jointly sponsored pension plan for OPSEU-represented employees

OPTrust launches www.optrust.com

1998



OPTrust leads the pension industry in offering same-sex partner survivors benefits

2001

OPTrust launches its first Client Satisfaction Survey to take feedback from members



Investment division established allowing OPTrust to build its internal investment capabilities

2003



OPTrust launches Online Services – our secure member website

2006



Private Markets investment program (private equity and infrastructure) launched

2010



OPTrust becomes signatory to the United Nations Principles for Responsible Investment



OPTrust opens a Private Markets investment office in London, England

2013



OPTrust is the only Canadian pension plan shortlisted for a global award to recognize excellence in responsible investment reporting



OPTrust becomes the first Canadian pension plan to open an office in Australia (Sydney)

OPTrust achieves 18.1% annual growth in its first three years bringing the Plan's assets to \$7.7 billion by the end of 1997

1997



The Plan reaches \$10B in assets

2000



OPTrust launches 'Direct Contact' bringing pension education sessions to our members at locations across the province

Plan reaches a major milestone when it becomes fully funded for the first time — 27 years ahead of schedule

2002



Real Estate Group established to grow the Fund's real estate portfolio

2004

OPTrust has 20,000 pensioners



Global economic crisis results in \$2.4B loss



2008

Sponsors negotiate new funding framework agreement that freezes contributions for five years while maintaining stability of the Plan

2012

Plan once again fully funded – eliminating \$818 million deficit resulting from 2008's economic crisis

OPTrust achieves our strongest overall satisfaction rating to date from our members and retirees (8.9 out of 10)



2014