Trustees & Administrators Institutes

June 13-17, 2026
Hilton San Diego Bayfront
San Diego, California

www.ifebp.org/trusteesadministrators

Educated Trustees.

Stronger Plans.

KEY SESSIONS INCLUDE:

- Economic Update
- How Changing Government Policy Is Impacting Benefits
- The GLP-1 Craze
- Artificial Intelligence in Benefits
- Litigation Risk for Employee Benefit Plans

International Foundation
OF EMPLOYEE BENEFIT PLANS

Trustees & Administrators Institutes

Trusted Education With Proven Value

There is one thing you can count on in challenging times—the International Foundation's commitment to delivering timely, relevant and balanced education on trends, issues and future direction of the industry that you need to succeed.

The Institutes offers two tracks. You must register for one, and there is no cross attendance allowed between tracks.

- **Advanced Trustees and Administrators Institute** covers hot topics in benefits and is designed for those who have three or more years of experience. See details on page 6.
- **New Trustees Institute—Level I: Core Concepts** is for trustees who are new to serving on a multiemployer trust fund, usually within the first three years of service. Trustees who have served for more than three years but have never attended a Foundation educational program will also benefit from New Trustees Institute—Level I. The course covers the key areas of responsibility in your role as a trustee. See details on page 14.

Preconference Educational Opportunities (separate registration required):

- **Trustees Institute—Level II: Concepts in Practice** will be offered on Saturday and Sunday, June 13-14, 2026. This course takes a deeper dive into the content covered in the Level I course. Having the Level II program on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. See details on page 18. This course is for multiemployer trustees with three or more years of experience who have completed the New Trustees Institute—Level I.
- **The Sunday preconference, The Leadership Mindset: Advancing Clarity, Connection and Courage,** is offered on June 14, 2026 from 8:00 a.m. to 1:00 p.m. For a full description of the Sunday preconference option, see page 21.

Held in conjunction with the

Accounting and Auditing Institute for Employee Benefit Plans

Encourage your fund accountant and staff to join you in San Diego to get targeted education for their role.

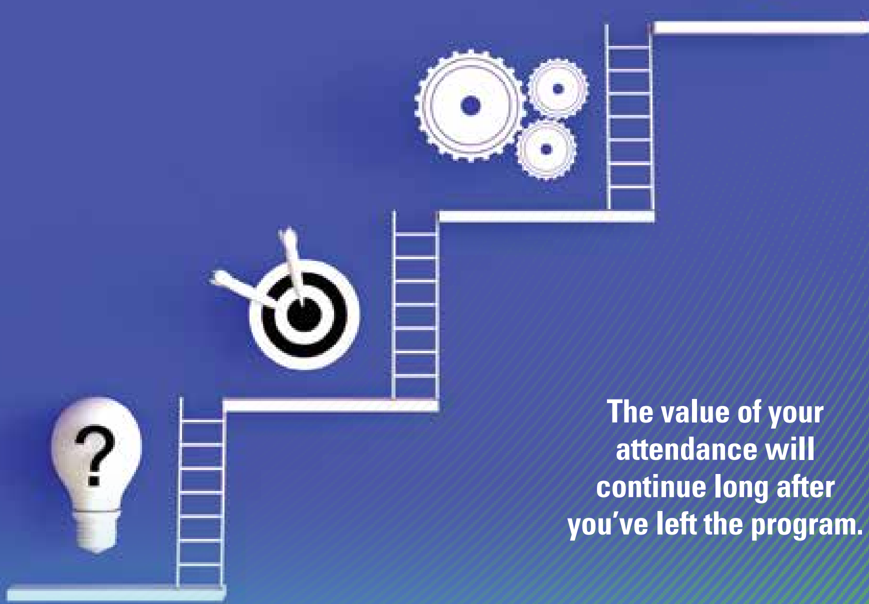
Public Plan Trustees Institute—Levels I and II

Attend these new programs designed for public sector health and retirement trustees and fiduciaries.

Five Reasons You Need to Join Us This June

1. Fulfill your fiduciary duty or obligation to your clients to be informed and educated on the important issues facing your fund, the employee benefits industry and your members.
2. Interact with and learn from industry experts about the current state of affairs, trends and newest initiatives being implemented.
3. Meet with industry vendors in the exhibit hall to explore new and innovative products and services that support your plan participants, improve your efficiency and increase productivity.
4. Engage and network with peers to learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to consider.

5. Bring home helpful resource materials to share with colleagues—from sample documents to checklists and case studies.



The value of your attendance will continue long after you've left the program.

SESSIONS AT A GLANCE

PRECONFERENCES		
Trustees Institute—Level II: Concepts in Practice	**Saturday, June 13, 2026**—8:00 a.m.-5:00 p.m. ***AND*** **Sunday, June 14, 2026**—8:00 a.m.-4:00 p.m.	
The Leadership Mindset: Advancing Clarity, Connection and Courage	**Sunday, June 14, 2026**—8:00 a.m.-1:00 p.m.	
ADVANCED TRUSTEES AND ADMINISTRATORS INSTITUTE		
MONDAY | June 15, 2026		
7:30-8:45 a.m.	Economic Update	
9:00-10:15 a.m.	How Changing Government Policy Is Impacting Benefits	
10:30-11:45 a.m.	Health Care Legal and Regulatory Update	Is the OCIO Model Right for Your Fund?
1:15-2:30 p.m.	Asset Allocation in Today's Climate	Administrative Issues in 401(k) Plans
2:45-4:00 p.m.	Litigation Risk for Employee Benefit Plans	The GLP-1 Craze
TUESDAY | June 16, 2026		
7:30-8:45 a.m.	Funding Strategies	Maximizing Your International Foundation Relationship
9:00-10:15 a.m.	Best Practices for Retirement Planning	Mental Health Benefits and Support
10:30-11:45 a.m.	Labor Management Industry and Scholarship Funds	Software Systems for Administrators
1:15-2:30 p.m.	Artificial Intelligence in Benefits	What's on the Horizon in Health Care
2:45-4:00 p.m.	How Robust Is Your Cybersecurity Program?	

ADVANCED TRUSTEES AND ADMINISTRATORS INSTITUTE *(continued)*		
WEDNESDAY | June 17, 2026		
7:30-8:45 a.m.	Finding and Fighting Fraud in Benefits	Insurance Coverages You Should Have
9:00-10:15 a.m.	Trustee Best Practices	Administrators' Roundtable
10:30-11:45 a.m.	Healthy Choices to Improve Wellness	
NEW TRUSTEES INSTITUTE—LEVEL I: CORE CONCEPTS		
MONDAY | June 15, 2026		
7:30-11:30 a.m.	Trustee Responsibility and Legal Environment	
12:30-4:30 p.m.	Investing Health and Welfare and Pension Assets	
TUESDAY | June 16, 2026		
7:30-11:30 a.m.	Governance	
12:30-4:30 p.m.	Overview of Health and Welfare Plans	
WEDNESDAY | June 17, 2026		
7:30-11:30 a.m.	Overview of Retirement Plans	
CONCURRENT PROGRAMS		
Accounting and Auditing Institute for Employee Benefit Plans	**Monday, June 15, 2026 and Tuesday, June 16, 2026** 7:30 a.m.-4:00 p.m. **Wednesday, June 17, 2026**—7:30-11:45 a.m.	
Public Plan Trustees Institute—Levels I and II	**Monday, June 15, 2026 and Tuesday, June 16, 2026** 7:30 a.m.-4:30 p.m.	

Register Today! www.ifebp.org/trusteesadministrators

Main Conference

Advanced Trustees and Administrators Institute

June 15-17, 2026

The Advanced Trustees and Administrators Institute has a longstanding history of providing quality and relevant education to experienced multiemployer trustees and administrators. Immerse yourself in the deeper issues and hot topics of today, and don't forget to take a look at the preconference options to round out your education.

While this conference is open to all, it is designed for multiemployer trustees who have served for over three years and have completed the Foundation's New Trustees Institute—Level I: Core Concepts course, as well as administrators who have completed the former Essentials of Multiemployer Trust Fund Administration course or the new Multiemployer Plan Administration course. Plan professionals and service providers have also found value in attending to keep abreast of benefits issues, learn alongside clients and obtain continuing professional education.

Preconference Options—Many attendees of the Trustees and Administrators Institutes find value in attending one of the preconference options on Saturday and/or Sunday. See page 18 for the Trustees Institute—Level II: Concepts in Practice course and page 21 for The Leadership Mindset: Advancing Clarity, Connection and Courage. A separate registration is required for the preconference options.

SUNDAY | June 14, 2026

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

(Refreshments and light hors d'oeuvres will be served.)

MONDAY | June 15, 2026

6:30 a.m.-5:00 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-8:45 a.m.

Economic Update

Understanding where the economy is and what might be coming down the road is key to your success in overseeing your pension and health and welfare assets, managing your work and workers, and planning for the future. This session will give you insights into key economic indicators and how they might impact the interest rate environment and investment opportunities around the globe. Topics include:

- The health of the U.S. economy
- The path for inflation
- The labor market
- The Federal Reserve and interest rates
- AI and equity market valuations.

Speaker: **Jack Manley**, JP Morgan Asset Management

9:00-10:15 a.m.

How Changing Government Policy Is Impacting Benefits

This session will provide insight into government policies on issues related to employee benefit plans. Discussion will consider the short- and long-term impact on plans. Potential topics include:

- Legislative process—how "gridlock" has spurred more employee benefit policy-making through regulations
- Health policy—affordable access to care, cost and quality transparency, initiatives to control drug costs
- Retirement policy—defined benefit plan reforms, 401(k) investments (e.g. ESG, cryptocurrency, private equity)
- Implications for trustees, administrators and plan sponsors.

Speaker: **James A. Klein**, American Benefits Council

MONDAY | June 15, 2026 *(continued)*

10:30-11:45 a.m. | *concurrent sessions*

Health Care Legal and Regulatory Update

This session will feature an overview of legislative and regulatory activity relating to employee benefit plans, including:

- The status of recent and proposed legislation and regulations
- Updates from EBSA, the DOL and IRS agencies
- Implications for trustees and administrators.

Speaker: **Elena Lynett**, Segal

Is the OCIO Model Right for Your Fund?

While not for every fund, OCIO models have been used successfully by many funds to outsource their investment management. This session will explore how this model works in practice and address:

- Defining an OCIO
- Risks, pros and cons of outsourcing investment management
- Monitoring and accountability
- Implications for trustees.

Panelists: **Gabrielle D. Fox**, Proskauer LLP
Christopher J. G. Brockmeyer, The Broadway League
Stephen MacLellan, Meketa Investment Group, Inc.

11:45 a.m.-1:15 p.m.

Lunch in Exhibit Hall

1:15-2:30 p.m. | *concurrent sessions*

Asset Allocation in Today's Climate

Constructing a portfolio of investments to meet the future obligations of the fund and participants' needs is complex at best. Discerning and reacting to market data and performance requires constant education and engagement. Keep abreast of what's happening as you consider:

- Benchmarking investment data
- Investment vehicles—what's hot
- Risk, return and timing
- Portfolio management
- Investment policy statement.

Speaker: **Michael Cairns**, NEPC

MONDAY | June 15, 2026 *(continued)*

Administrative Issues in 401(k) Plans

This session will dive into the administrative issues related to 401(k) plans. Discuss the policy, practice and current issues relating to:

- IRS vs. DOL regulations
- Compliance
- Educating employers and plan participants
- Fees.

Speakers: **Dawn M. Lichtner**, Vanguard Group
Chantal M. Louvet, Vanguard Workplace Solutions

2:45-4:00 p.m. | *concurrent sessions*

Litigation Risk for Employee Benefit Plans

There have been many high-profile legal cases that have garnered attention in the employee benefits industry. The risk of litigation has certainly risen over time. Learn the status of current litigation and what you should be doing as it relates to:

- Investments
- 401(k) plans
- Prescription drugs.

Speaker: **Christopher M. Leins**, Slevin & Hart, P.C.

The GLP-1 Craze

GLP-1 drugs are one of the hottest classes of drugs on the market today. This session will consider the pros and cons of GLP-1 drugs from the perspectives of patients and plans. Topics include:

- Outcomes
- Unintended consequences
- Cost
- Coverage options.

Speakers: **Josh Bindl**, National CooperativeRx
Bill Papa, NFP, an AON Company

4:00-5:00 p.m.

Networking Reception

TUESDAY | June 16, 2026

6:30 a.m.-4:30 p.m.

Registration/Information

TUESDAY | June 16, 2026 *(continued)*

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-8:45 a.m. | *concurrent sessions*

Funding Strategies

This session is focused on best practices for funding your benefit plan, including:

- Reserve strategies and policies
- Benchmarking
- Stop-loss coverage
- Best practices
- Unique issues for health, retirement and apprenticeship funds.

Panelists: **Seth Almaliah**, Segal Marco Advisors
Nick Kingsley, Horizon Actuarial Services
Jason L. Russell, Segal

Maximizing Your International Foundation Relationship

One of your fiduciary responsibilities is to be educated. This session will help you understand how to be deliberate about your learning, including how to:

- Get the most out of your education
- Plan your path of education
- Access the many member benefits you have available to you
- Obtain free resources.

9:00-10:15 a.m. | *concurrent sessions*

Best Practices for Retirement Planning

Benchmark your own retirement plannings approach as you discuss best practices in:

- Preparing for and transitioning to retirement
- Switching from accumulation to decumulation
- Health care in retirement
- Government benefits
- Resources for smaller plans.

Speaker: **Kevin S. Seibert, CEBS, CFP, CRC**, InFRE

Mental Health Benefits and Support

The mental health crisis in the U.S. permeates all aspects of life and often shows up in the work environment. Having a comprehensive approach to providing support and benefits for mental health is crucial to your plan participants.

- The role of telehealth
- Peer support and EAP services
- Dealing with shortage of providers
- Educating members

Speaker: **Nikole Benders-Hadi**, Talkspace

TUESDAY | June 16, 2026 *(continued)*

10:30-11:45 a.m. | *concurrent sessions*

Labor Management Industry and Scholarship Funds

Industry funds and scholarship funds are common in the Taft-Hartley world, but these funds operate differently than your traditional health or pension trust fund. This session will give you guidance relating to:

- Setup
- Funding
- Uses
- Reporting.

Speakers: **James K. Estabrook**, Lindabury, McCormick, Estabrook & Cooper, P.C.
Lisa Gingeleski, Lindabury, McCormick, Estabrook & Cooper, P.C.

Software Systems for Administrators

Representatives from benefits software providers have been invited to discuss issues of common concern with trustees and administrators. This session will feature a facilitated discussion on best practices, lessons learned from implementation, outstanding issues and future opportunities.

Panelists: **Mary Davis**, Majesco
Alan Larson, Carpenter Funds Administrative Office of Northern California Inc.
Michael Goldberger, MIDIOR Consulting

11:45 a.m.-1:15 p.m.

Lunch in Exhibit Hall

1:15-2:30 p.m. | *concurrent sessions*

Artificial Intelligence in Benefits

As artificial intelligence is taking hold in the business world, it is important to understand how it can be used in our industry. This session will address:

- Efficient use in administration
- Policies you should have
- Compliance issues
- Cybersecurity concerns
- Use of AI by your vendors and participants
- Best practices.

Speaker: **David Levine**, Groom Law Group, Chartered

TUESDAY | June 16, 2026 *(continued)*

1:15-2:30 p.m. | *concurrent sessions*

What's on the Horizon in Health Care

From new cancer treatments to specialty PBMs, there are many new developments in health care. Learn what's in the pipeline and how it may impact your plans and participants. Learn about:

- Promising treatment modalities
- Design trends
- Technology
- Pharma developments.

Speaker: **Aruna Vohra**, Horizon Actuarial Services LLC

2:45-4:00 p.m.

How Robust Is Your Cybersecurity Program?

Given the volume of daily cyberattacks, protecting your assets is a never-ending task. Benchmark your cybersecurity program as you learn about:

- DOL guidance
- Training employers and participants
- Unique issues for pension, health and apprenticeship funds
- Penetration testing.

Speakers: **Kylynn Rees**, Withum
Julie Tracy, Withum

WEDNESDAY | June 17, 2026

6:30-11:45 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m. | *concurrent sessions*

Finding and Fighting Fraud in Benefits

Your funds have a lot of money, which makes them a target for fraudsters. Learn about the latest techniques and revisit the more common methods that fraudsters are using to make your fund a victim. Take away an understanding of:

- Types of fraud
- How to find fraud
- Internal controls
- What to do when you find fraud.

Speaker: **Tyler L. Geiman**, Novak Francella LLC

WEDNESDAY | June 17, 2026 *(continued)*

7:30-8:45 a.m. | *concurrent sessions*

Insurance Coverages You Should Have

Insurance is one of the primary risk management strategies you have in your toolkit. This session will review common coverages, options, benchmarking and compliance.

- Fiduciary liability
- General liability
- Cyber liability
- Stop-loss coverage
- E&O coverage

Speaker: **Christine (Tina) Fletcher**, Ullico Casualty Group, LLC

9:00-10:15 a.m. | *concurrent sessions*

Trustee Best Practices

Bring your ideas and issues for discussion. This panel discussion will focus on best practices for trustees, addressing:

- Your role as a trustee
- What trustees can and can't do
- Having difficult conversations
- Exercising your oversight role
- Audience situations.

Administrators' Roundtable

This session will feature a discussion of issues of interest to administrators today. Come prepared to share your experience and contribute to the dialogue on decision-making structures, improving efficiency, resources for small fund offices and customer service. Plus, bring your own ideas for topics to be discussed.

Panelists: **Leslie N. Gallo**, Northwest Administrators, Inc.
Ronald W. Laudel, Central Illinois Carpenters Health and Welfare Fund
Sarah A. Padgett, Laborers' Joint Delinquency Committee

10:30-11:45 a.m.

Healthy Choices to Improve Wellness

This session will focus on the connection that healthy choices, good nutrition and support programs have with improving the wellness of your members.

Speaker: **Kelly Springer, M.S., RD, CDN**, Kelly's Choice, LLC

Main Conference

New Trustees Institute—Level I: Core Concepts

June 15-17, 2026

Designed for Taft-Hartley multiemployer benefit plan trustees, the New Trustees Institute—Level I: Core Concepts course encompasses five modules, covering the core areas of responsibility within the role of a trustee. Take away an understanding of the key issues in managing your retirement, health and welfare, or apprenticeship funds as well as the complexities of trust fund management and administration. Content is for those new to serving on a multiemployer trust fund, within the first three years of service, or trustees who have not previously attended a Foundation education program. New Trustees Institute—Level I: Core Concepts is also ideal for collective bargaining and other personnel who work with trustees and want a better understanding of their role and responsibilities.

SUNDAY | June 14, 2026

7:30-8:00 a.m.

Sunday Preconference Registration

(for those who are registered)

8:00 a.m.-1:00 p.m.

Optional Preconference Workshop:
The Leadership Mindset: Advancing Clarity, Connection and Courage

This opportunity is available to all. A separate registration is required.

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

(Refreshments and light hors d'oeuvres will be served.)

MONDAY | June 15, 2026

6:30 a.m.-5:00 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-11:30 a.m.

Trustee Responsibility and Legal Environment

- History of benefits/legislation
- Governing documents
- Fiduciary responsibilities under ERISA
- Relationship of trustees and parties to the collective bargaining agreement
- Conducting effective trustee meetings

11:30 a.m.-12:30 p.m.

Lunch/Exhibit Hall Open

12:30-4:30 p.m.

Investing Health and Welfare and Pension Assets

- Investing process
- Investment terminology
- Risk and return
- Investment objectives and policy
- Asset classes
- Asset allocation
- Market performance
- Selecting managers and monitoring performance

4:30-5:00 p.m.

Networking Reception in Exhibit Hall

(Refreshments and light hors d'oeuvres will be served.)

TUESDAY | June 16, 2026

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-11:30 a.m.

Governance

- Financial statements
- Internal controls
- Administration
- Documents, records and meeting minutes
- Working with plan professionals
- Communication
- Best practices

11:30 a.m.-12:30 p.m.

Lunch in Exhibit Hall

12:30-4:30 p.m.

Overview of Health and Welfare Plans

- Overview of health and welfare programs
- Plan funding
- Plan design
- Administration and financing metrics
- Communication needs and requirements
- Data collection and analysis
- Cost-control initiatives
- Health care reform, legal/legislative developments

New for 2026: You must attend all **five modules** to earn the Certificate of Attendance. Please plan your travel accordingly.

WEDNESDAY | June 17, 2026

6:30-11:30 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-11:30 a.m.

Overview of Retirement Plans

- Purpose and objectives
- Actuarial concepts
- Administration
- Manage the money
- Defined benefit pension plans
- Defined contribution and hybrid plans
- Accounting changes
- Market performance
- Legal and legislative developments
- The future of retirement

New Trustees Institute—Level I: Core Concepts Faculty

Troy Brown, CFA
Managing Director, Institutional Advisory Services
Mariner Institutional

Paul Catenacci, Esq.
Partner
Novara Law Group PLLC

Kelly S. Coffing, EA, FSA, MAAA
Principal and Consulting Actuary
Milliman, Inc.

Tim Connor, FSA, EA, MAAA
Principal & Consulting Actuary
Milliman, Inc.

Ian W. Jones
Senior Institutional Advisor
Mariner Institutional

Ron Laudel
Benefit Plans Administrator (Retired)
Mid-America Carpenters Regional Benefit Services, Inc.

Michael Ledbetter, CEBS
Partner
Ledbetter Partners LLC

Robert M. Projansky, Esq.
Partner
Proskauer Rose LLP

Dee Shaw
Health Benefit Consultant
Soshent Partners

Aaron Slaughter, CPA
Partner
Withum

Lee Townsend, FSA, EA, MAAA
Consulting Actuary
Milliman, Inc.

Carrie Vaughn, FSA, EA, MAAA
Principal & Consulting Actuary
Milliman, Inc.

Corey J. Wirth, CEBS
Executive Director
IBEW-NECA Service Center, Inc.

Two-Day Preconference Options

Trustees Institute—Level II: Concepts in Practice

June 13-14, 2026

Trustees Institute—Level II: Concepts in Practice is designed for Taft-Hartley multiemployer benefit plan trustees with three or more years of experience **who have completed New Trustees Institute—Level I: Core Concepts**. The curriculum will take a deeper dive into the benefits industry and your oversight role, with a focus on practical applications. This highly interactive learning experience will give you the framework and tools you need to address the many challenges you face as a trustee.

Having the Level II course on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. Please note that a separate registration is required to attend both the Level II course and the Advanced Trustees and Administrators Institute.

SATURDAY | June 13, 2026

7:00 a.m.-5:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00 a.m.-12:15 p.m.

Governance/Administration

- Fiduciary duty
- Policies and procedures
- Group scenarios
- Prohibited transactions
- Deadlocks and arbitration
- Board governance
- Fraud prevention detection

12:15-1:00 p.m.

Lunch *(provided)*

SATURDAY | June 13, 2026 *(continued)*

1:00-5:00 p.m.

Investments

- Terminology and reports
- Who are the players? What are their roles?
- Asset allocation
- Other investment issues
- Alternative investment options
- Investment open forum

SUNDAY | June 14, 2026

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00-11:30 a.m.

Retirement

- Financial literacy
- Defined contribution plans/annuities
- Pension basics
- PPA and MPRA
- Plan redesign
- Withdrawal liability
- Open forum

11:30 a.m.-12:15 p.m.

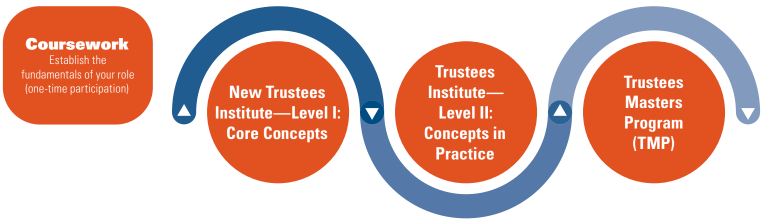
Lunch *(provided)*

12:15-4:00 p.m.

Health Plans

- Health plan basics
- Appeals committee
- Prescriptions and mental health
- Monitoring and selecting service providers
- Rapid-fire Q&A
- Emerging issues

Multiemployer **Trustees and Fiduciaries** Education Path



Trustees Institute—Level II: Concepts in Practice Faculty

Lee Centrone
Senior Vice President
BeneSys

Kevin Culp, EA, FSA, MAAA
Senior Consulting Actuary
Horizon Actuarial Services, LLC

David P. Dorsey, CPA
Partner
Withum

Mary Ann T. Dunleavy, ASA, EA, MAAA
Senior Consulting Actuary
Horizon Actuarial Services, LLC

Michael D. Joyce, Esq., CEBS
Senior Vice President and Senior Investment Consultant
Segal Marco Advisors

Travis J. Ketterman, GBA
Partner
McGann, Ketterman & Rioux

Stephanie Patrick, FSA, MAAA
Senior Consulting Actuary
Horizon Actuarial Services, LLC

Andrew E. Staab
Vice President and Senior Corporate Counsel
U.S. Bank National Association

Nick S. Trella
Senior Vice President/ Principal
Segal Marco Advisors

To register for the Level II program, trustees must have completed the New Trustees Institute—Level I: Core Concepts course.

One-Day Preconference Workshop

The Leadership Mindset: Advancing Clarity, Connection and Courage

Sunday, June 14, 2026 | 8:00 a.m.-1:00 p.m.

Many people in formal leadership roles do not provide solid leadership for their teams, and many people who do not have formal leadership titles exhibit the traits of courageous, high-capacity leadership. True leadership is not about a title; it's about effective thinking, emotional responsiveness and values-based decision making. It's about maximizing your own potential to serve others and call them to greatness.

Whatever your title, developing a leadership mindset will enhance your own individual performance in the workplace, contribute to the betterment of your team, and allow you and your team to more fully support your organization's mission. Developing a leadership mindset also enhances personal and professional relationships and makes work—and life—so much more fulfilling.

This session is designed to support anyone in any professional role as they enhance their leadership mindset and capacity through:

- Increased self-awareness and effective thinking
- Improved working relationships and team communication
- Enhanced ability to resolve differences and conflicts with others
- Greater ability to operate in alignment with purpose and values
- Using intentional listening and powerful questions to foster connection, trust and mutual understanding
- Implementing intentional self-development and team-building strategies to cultivate and sustain a thriving workplace culture.

Rebecca S. Johnson, M.S., CHWC
Co-Founder and Chief Integrator
Vidl Work
Seminole, Florida

Concurrent Program at the Hilton San Diego Bayfront:

Accounting and Auditing Institute for Employee Benefit Plans

June 15-17, 2026 | Hilton San Diego Bayfront | San Diego, California

Virtual option available

Accountants and auditors working with benefit plans must stay current with evolving accounting standards, reporting and disclosure requirements, industry best practices and emerging trends in the employee benefits field.

Designed by industry experts, this conference will address the technical topics most relevant to today's accounting and auditing professionals. Gain practical insights; earn continuing professional education (CPE) credits; and engage with fellow professionals, trustees and administrators through complementary programs that encourage shared learning and discussion.

Who Should Attend

The Accounting and Auditing Institute for Employee Benefit Plans is designed for internal and external accountants, including fund office and/or TPA accountants, who serve employee benefit plans.

Benefits of Attending

- Get up-to-date information on plan disclosure requirements.
- Understand current issues that impact multiemployer pension and health and welfare plan audits.
- Network with your peers who face similar challenges and brainstorm workable solutions.
- Earn meaningful CPE credits.

CPE

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of CPE on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: **www.nasbaregistry.org**.

This is a Group Live and Group Internet-Based program. No prerequisites or advanced preparation are required. Except where noted, sessions are at the intermediate level. For more information regarding administrative policies such as complaints and refunds, please contact our offices at (262) 786-6710, option 2.

Co-Located Program at the Hilton San Diego Bayfront:

Public Plan Trustees Institute—Level I

June 15-16, 2026 | Hilton San Diego Bayfront | San Diego, California

Public Plan Trustees Institute—Level II

June 15-16, 2026 | Hilton San Diego Bayfront | San Diego, California

This new course is designed for public sector health and retirement trustees and other fiduciaries. As a replacement for the Certificate of Achievement in Public Plan Policy (CAPPP®), this program is streamlined and more relevant than ever for trustees and other fiduciaries in the public sector. Each section will be led by industry experts, ready to help you apply the concepts you will learn to your real-world challenges and bring the value back to your organization.

For more information, visit www.ifebp.org/public.

LEVEL I

- Fiduciary Responsibility and Plan Governance
- Retirement Plans
- Health Plans
- Legal Environment

LEVEL II

- Public Plan Governance and Emerging Issues
- Investing Public Plan Assets
- Trustee Board Strategies
- Plan Administration and Communication Concepts

June Hotel Information

Hilton San Diego Bayfront

San Diego, California
June 13-17, 2026

The June Trustees and Administrators Institutes will be held at the Hilton San Diego Bayfront in San Diego, California. Rising above San Diego Bay and steps from Gaslamp Quarter, Petco Park and Rady Shell at Jacobs Park, Hilton San Diego Bayfront is the signature SoCal resort. Enjoy a tailored, urban and coastal experience with bright and unparalleled views in every guest room, relaxing amenities and locally inspired dining.

The International Foundation has secured a low room rate for institute attendees. You must book your room through the Foundation by indicating your needs on the registration form.

Reservation Deadline: Monday, May 11, 2026

Hotel Accommodations: You will be charged a $450 deposit upon registration. Please specify your hotel requirements on the registration form.

Rate: US$319.00 Single/Double Occupancy
(additional $20/person per night for 3rd and 4th guest)

For additional hotel information, visit our Hotel/Travel tab at www.ifebp.org/trusteesadministrators.

Note: Hotel room availability is not guaranteed outside of scheduled program dates. Hotel reservations are confirmed on a first-come-first-served basis. Best available rate/hotel will be assigned if necessary.

Hotel Cancellation Policy: Hotel deposit forfeited for reservations canceled within 72 hours prior to arrival.

Making the Most of the Exhibit Hall

Maximizing Your Takeaways From Exhibitors

Exhibitors are more than just providers of swag; they are sources of industry knowledge, potential solutions and networking opportunities. With a strategy for conversations with exhibitors, you can turn the exhibit hall into one of the most valuable parts of your conference experience. Here are some suggestions for maximizing your time with these vendors:

Before the Conference

- **Review the exhibitor list.** Go through the list of participating companies located on the website before the event. Identify those with products and services that align with the needs of your plan members.
- **Set clear objectives.** Determine what you want to learn or gain from your identified exhibitors. It may be:
  - Finding a new vendor for a particular service
  - Discovering a new tool for a specific task
  - Getting a demo of a particular product feature
  - Researching a specific solution or technology
  - Connecting with a technical specialist or executive.
- **Prepare your specific, open-ended questions.**

Engaging at the Booth

- **Be strategic with your time.** With limited break times, prioritize visiting your preselected companies first.
- **Go beyond the giveaway.** While a cool pen is nice, your priority should be information. Engage with the booth staff and ask your prepared, targeted questions.
- **Share your context.** Briefly explain who you are and what challenges you are trying to solve. This helps the exhibitor tailor their information to your specific needs, making the conversation more valuable for you.
- **Ask for a demo.** Seeing a product in action is one of the best ways to understand its true value. Ask for a brief, personalized demonstration.
- **Get scanned and take notes.** Allow them to scan your badge (for follow-up) but also jot down the name and title of the person you spoke with and your key takeaway from the conversation. This will be invaluable for your follow-up.
- **Don't be shy.** Initiate conversations! Make eye contact and step up to a booth. Remember, the exhibitors are there specifically to talk to you.
- **Participate in the Passport Program!** Grab an exhibit hall "passport" from the International Foundation Connection Center and play the game by visiting vendors to be entered to win!

Exhibit and Sponsorship Opportunities

Do you have a service provider that could benefit from exhibiting at or sponsoring the Trustees and Administrators Institutes? Or do you offer a product or service that could be beneficial to trustees and administrators supporting multiemployer and public sector benefit plans? Valuable exhibitor and sponsorship opportunities are available at the February and June Trustees and Administrators Institutes.

Contact Us!

For Exhibits and Sponsorships
Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Benefits of Exhibiting

The exhibit hall at the Trustees and Administrators Institutes is structured specifically to build valuable connections with attendees. As an exhibitor, you will:

- Reach a concentrated audience of over 400 trustees, administrators and plan professionals who serve multiemployer benefit plans
- Learn about the issues impacting your clients today by participating in educational sessions and networking with peers
- Secure quality leads—Attendees at each conference are decision makers who can directly impact your bottom line.

75%

of attendees at the Trustees and Administrators Institutes **do not** attend the Annual Conference, exposing you to a new audience.

Come Visit With Us!

The International Foundation of Employee Benefit Plans will have a booth at this year's Trustees and Administrators Institutes. Our on-site experts are here to answer any questions and talk with you about additional educational opportunities that are right for you.

Ready to Reserve a Booth Space or Sponsorship?

*Request a **2026 Exhibitor Brochure and U.S. Specialty Sponsorship Brochure** for full details.* Contact Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

REGISTRATION

Register today at www.ifebp.org/trusteesadministrators.

CONFERENCE REGISTRATION FEES

Advanced Trustees and Administrators Institute
New Trustees Institute—Level I: Core Concepts
Accounting and Auditing Institute for Employee Benefit Plans

Through May 4, 2026	Member: $1,795 | Nonmember: $2,125
After May 4, 2026	Member: $2,095 | Nonmember: $2,425

Separate registration for the preconferences is required.

Preconference Courses:

Trustees Institute—Level II: Concepts in Practice

Through May 4, 2026	Member: $1,795 | Nonmember: $2,125
After May 4, 2026	Member: $2,095 | Nonmember: $2,425

Public Plan Trustees Institute—Levels I and II

Through May 4, 2026	Member: $1,495 | Nonmember: $1,715
After May 4, 2026	Member: $1,795 | Nonmember: $2,015

Sunday Preconference Workshop: The Leadership Mindset: Advancing Clarity, Connection and Courage

Through May 4, 2026	Member: $560 | Nonmember: $670
After May 4, 2026	Member: $710 | Nonmember: $820

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency. More information is available at www.ifebp.org/ce.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.

CEBS COMPLIANCE APPROVED

Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.

Join us in 2026 for this valuable education!

Trustees & Administrators Institutes

June 13-17, 2026
Hilton San Diego Bayfront
San Diego, California

Visit www.ifebp.org/trusteesadministrators for more information.

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International Foundation OF EMPLOYEE BENEFIT PLANS

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