

EMPLOYEE PENSIONS AND BENEFITS EDUCATION 2026-2027

The Actions of Our Pensions and Benefits Community Impact the Lives of Millions of Workers

Let the International Foundation fuel your work through education.

WHY CHOOSE THE FOUNDATION?

If you work in employee pensions and benefits, no day is ever the same. The last thing you want to do is spend your time researching where to find vetted, impartial, quality education and information to stay compliant and informed. Since 1968, the Foundation has been the largest organization for employee pensions and benefits education in Canada and the United States. We offer:

- Content developed and delivered by Canadian industry leaders who work in the field and relate to the day-to-day challenges you face
- Unique networking opportunities, so you can meet and share ideas with others who understand your role
- Clear tools and takeaways, with a wide range of educational options and delivery methods to choose from
- Timely information, so you can respond quickly to changing laws, regulations and industry trends.

“
Benefits education
has reignited my
love of learning.
Shona Dion
Master Construction
Trade Union Benefit Plan

GROW YOUR KNOWLEDGE. GROW YOUR TEAM. GROW YOUR IMPACT.

Choose from
over 10
in-person
conferences

Learn from
wherever you are
through

4
virtual certificates

Find 25
in-person opportunities
to train specifically
for your role

Benchmark your
plans through
**survey
reports**

Stand out
with 7
certificates
(in person or online)

Dig into the
details through
10
toolkits

Brush up on
important topics
through 8
e-learning courses

Demonstrate your
commitment to
the industry
with 3
professional
designations

Learn from an
organization with
70 years
of pensions and benefits
education experience

Tune into
20+
new webcasts

PROGRAMS BY TOPIC

No matter what area of benefits you manage, there's an educational program for you! View the listing below before diving into this catalogue so you know what to look for, depending on your role.

COMPLIANCE AND BENEFITS MANAGEMENT

In-person conferences:

- Annual Canadian Employee Benefits Conference
- Canadian Legal and Legislative Update
- EVOLVE Benefits and Workforce Strategies Summit
- ISCEBS Employee Benefits Symposium

In-person certificates:

- Certificate in Canadian Benefits Management
- Certificate in Global Benefits Management

In-person courses:

- Canadian Benefits Plan Administration
- Global Benefits: Regional Compliance Trends
- Global Benefits Strategy
- Inclusive Benefits and Pension Modernization Workshop

Virtual certificates:

- Advanced Pensions Certificate

Virtual courses:

- Canadian Total Rewards
- Global Benefits Fundamentals

FIDUCIARY MANAGEMENT

In-person conferences:

- Annual Canadian Employee Benefits Conference
- MTMS Advanced Leadership Summit

In-person courses:

- Foundations of Trust Management Standards (FTMS®)
- Advanced Trust Management Standards (ATMS®) Sessions A and B
- Master of Trust Management Standards (MTMS®) Sessions A and B

Virtual courses:

- Foundations of Trust Management Standards (FTMS)

SPECIALIZED TRAINING

In-person conference:

- Institute for Apprenticeship, Training and Education Programs

In-person course:

- Designing Curriculum to Close the Skills Gap

HEALTH CARE

In-person conferences:

- Annual Canadian Employee Benefits Conference
- Canadian Health and Wellness Innovations Conference
- ISCEBS Employee Benefits Symposium

Virtual certificates:

- Fundamentals in Group Benefits

Virtual courses:

- Group Benefits Design and Administration
- Group Benefits Funding and Pricing
- The Group Insurance Landscape
- Life Cycle of a Group Benefits Plan

ORGANIZATIONAL WELLNESS

In-person conferences:

- Annual Art & Science of Health Promotion Conference
- Annual Wellness Summit
- Canadian Health and Wellness Innovations Conference

In-person courses:

- Inclusive Benefits and Pension Modernization Workshop

PUBLIC EMPLOYERS

In-person conferences:

- Annual Canadian Employee Benefits Conference
- Canadian Public Sector Pensions and Benefits Conference
- ISCEBS Employee Benefits Symposium

RETIREMENT/INVESTMENTS

In-person conferences:

- Annual Canadian Employee Benefits Conference
- Canadian Investment Institute
- ISCEBS Employee Benefits Symposium
- Portfolio Concepts and Management
- Séminaire sur la gestion des caisses de retraite

Virtual certificates:

- Advanced Pensions Certificate
- Fundamentals in Retirement Plans

Virtual courses:

- Employer-Sponsored Retirement Plans
- Life Cycle of a Group Retirement Plan
- The Retirement Landscape
- Retirement Plan Sponsor Responsibilities

GET THE MOST FROM THIS CATALOGUE

First, identify what sector you best represent, depending on your role. You'll notice these symbols throughout so you can easily identify the programs designed for you.

CP CORPORATE PLAN SPONSORS

These are benefit plans maintained by one employer.

Industries represented: Wide-ranging—technology, retail, energy, manufacturing

Example roles/titles: Benefits Manager, Director of Health Care Strategy, Senior Director of Human Resources, Director of Global Benefits, Director of Retirement Services, Benefits Analyst, Vice President, Director of Compensation and Benefits

G GLOBAL

These are multinational employers responsible for international global benefits management.

Example roles/titles: Global Benefits Specialist; Manager, International Benefits; Senior Manager, Global Benefits; Global Benefits Consultant; International Benefits Consultant; Senior Director, Global Benefits; Senior Global Benefits Analyst; Manager Benefit Operations, North America

ME MULTI-EMPLOYER PLANS

These benefit plans are the result of a collectively bargained plan, to which more than one employer contributes, and typically involve one or more local unions.

Industries represented: Construction-dominated, also hospitality/service, entertainment

Example roles/titles: Trustee, Labour Relations Director, Executive Director, Fund Administrator, Business Manager, Training Coordinator, Secretary-Treasurer

PE PUBLIC EMPLOYER PLANS

These are benefit plans established for employees of a federal, state, provincial and/or local government as well as those who work for publicly funded organizations such as police or fire systems, school systems and universities.

Systems represented: Provincial and local systems; school systems; safety (police and fire) systems

Example roles/titles: Executive Director; Director, Health Care; Director, Member Benefits; Chief Investment Officer; Trustee; Board Member; City Manager; Plan Administrator

F FRANÇAIS

Les programmes éducatifs offerts dans votre langue favorisent une meilleure compréhension des concepts complexes liés aux régimes d'avantages sociaux et de retraite.

Also note the different delivery methods of education throughout:

In-person
conferences

In-person
courses

In-person
certificates

Online
certificates

E-learning
courses



60TH
ANNUAL
CANADIAN



Employee Benefits Conference



November 7-10, 2027

Nassau, The Bahamas

Preconferences: November 5-7, 2027

www.ifebp.org/canannual27

The Annual Canadian Employee Benefits Conference celebrates 60 years in 2027! This conference is the premier source of comprehensive education for pension and benefit professionals. We invite you to join us in Nassau to learn about upcoming trends, legislative changes and key topics impacting your plan and its members. By attending, you'll gain actionable takeaways to improve your fund's operations and connect with your peers facing the same challenges as you.

The must-attend conference for plan sponsors who work with corporate and public benefit plans . . .

46TH ANNUAL
ISCEBS EMPLOYEE BENEFITS
Symposium

PE

CP

September 19-22, 2027 | San Diego, California

www.ifebp.org/symposium

The Symposium is one of the largest gatherings of employee benefits professionals in North America, hosted by the International Society of Certified Employee Benefit Specialists (ISCEBS), one of the International Foundation's affiliate organizations. Come for the specific, focused information you need for your plans and participants; stay for the new ideas, perspectives, tools and data you need to stay ahead of the curve in the changing world of work and to maintain a competitive and engaging benefits experience.

Dig deep into the newest trends and compliance requirements for group benefits and retirement benefits plans, and know you're learning from—and with—some of the best benefits experts from across North America. You'll come away with knowledge and strategies for a strong and comprehensive benefits approach and the connections to propel your career forward.



IN-PERSON CONFERENCES

www.ifebp.org/education



Canadian Investment Institute

Preconferences available

November 9-11, 2026 | Nassau, The Bahamas

August 9-11, 2027 | Halifax, Nova Scotia

Stay on top of the latest trends to maximize returns for the plan dollars you oversee. Attend the Canadian Investment Institute to learn from leading-edge investment experts and economic professionals who provide a strategic mix of investment sessions and opportunities to interact with speakers and your peers. If you are involved in plan investing, this program is a must-attend conference to fully understand the potential available for your fund's future successes.

Why You Should Attend:

- Learn from leading-edge investment and economic professionals in Canada.
- Choose from a unique mix of investment workshops that provide enhanced opportunities for interaction with speakers.
- Hear what other funds are doing and why.



Institute for Apprenticeship, Training and Education Programs

Preconference available

January 25-27, 2027 | San Diego, California

Virtual option available

Learn about efficient trust fund management and best practices for apprenticeship programs in Canada and the United States. This conference will address the current and relevant issues that are impacting your program, providing the clarity you need to plan for the future. Learn from experts, share ideas with your peers and return home with actionable plans to implement.

Why You Should Attend:

- Learn best practices in the management of your fund and running your training program.
- Understand legal and regulatory requirements.
- Discover strategies to avoid mistakes and reduce risks for your fund.
- Take away best practices for succession planning and creating the next generation of leaders.
- Learn more about mental health and substance use in your program.



Canadian Health and Wellness Innovations Conference

Preconference available

March 1-3, 2027 | Victoria, British Columbia

In this fast-changing landscape, the concept of wellness needs to encompass not just physical health but also mental, emotional and social well-being. Employers, unions and trustees must collaborate to address the unique challenges faced by the evolving workforce, taking into account the diverse needs and experiences of their employees. Inclusivity is crucial in wellness initiatives within health plans and the members you represent. To foster a more resilient and productive workplace, policies must adapt and innovate to remain relevant to all employees.

Why You Should Attend:

- Learn firsthand about the latest trends in health and wellness that could be important to your plan design.
- Find out how others have successfully introduced wellness initiatives to their members.
- Discover ways to motivate plan participants to take part in the shared responsibility for their own health.



IN-PERSON CONFERENCES

www.ifebp.org/education



37th Annual Art & Science of Health Promotion Conference

PE CP

Intensive Training Seminars available

April 14-16, 2027 | Tampa, Florida

This conference narrows the gap between research and practice by facilitating dialogue and encouraging meaningful collaborations between practitioners and scientists from corporate, clinical, education policy and entrepreneurial spheres.

Why You Should Attend:

- Join other health promotion and wellness professionals to learn, share and connect.
- Be inspired and equipped to bring new practices and approaches to your health promotion efforts.
- Find support in creating programs and resources that meet the needs of a diverse, multigenerational workforce.
- Learn strategies for raising awareness, building skills, and promoting policies and practices that foster population health and well-being, including more positive and supportive interactions.



Canadian Legal and Legislative Update

ME PE CP

Preconference available

May 5-6, 2027 | Québec City, Québec

Stay up to date on the latest legal and regulatory updates impacting your plans by attending the Canadian Legal and Legislative Update. This conference is relevant for trustees, plan sponsors, public employees and service providers. You will not want to miss the conference providing the latest updates on need-to-know information that will help your organization sail smoothly through the upcoming year.

Why You Should Attend:

- Focus on the critical information you need to know now with fresh and relevant topics.
- Gain a deeper understanding of the issues affecting the pensions and benefits industry and their impact on your funds.
- Take advantage of opportunities to network with your peers.



27^e Séminaire sur la gestion des caisses de retraite

ME PE CP F

6 mai 2027 | Montréal, Québec

Une journée pour comprendre, échanger et faire évoluer la gestion de votre caisse de retraite. Profitez de sessions ciblées, animées par des experts reconnus, et découvrez des solutions concrètes pour optimiser vos pratiques et soutenir la sécurité financière de vos participants.

Pourquoi y assister?

- Approfondissez des stratégies pertinentes pour votre fonds de retraite.
- Explorez de nouvelles approches afin d'améliorer vos résultats financiers.
- Maîtrisez les enjeux et tendances les plus récents pour mieux vous préparer à l'avenir.
- Échangez avec d'autres professionnels et élargissez votre réseau dans l'industrie.

IN-PERSON CONFERENCES

www.ifebp.org/education



EVOLVE Benefits and Workforce Strategies Summit

June 8-10, 2027 | Niagara-on-the-Lake, Ontario

PE CP

This dynamic conference for Canadian HR, pensions and benefits leaders will cover the latest trends to attract, retain and support your workforce. Learn innovative strategies during impactful sessions led by industry experts, and connect with your peers through unique networking opportunities.

Why You Should Attend:

- Learn the latest trends from experts in the industry.
- Connect with clients and colleagues at group registration tables.
- Participate in engaging networking experiences.



Canadian Public Sector Pensions and Benefits Conference

Preconference available

July 14-15, 2027 | St. John's, Newfoundland and Labrador

PE

Gain skills to tackle the unique challenges encountered by public sector plans. Conference sessions offer innovative solutions to ensure the viability of your pension and health and welfare funds. Engaging sessions and open forums provide practical solutions and insights for the issues plans are facing. Attendees can ask questions, gather feedback from content experts and learn from other attendees. Register for this valuable two-day conference and explore plan design, governance and communication strategies for public sector pensions and benefits.

Why You Should Attend:

- Learn from leading pension and benefits professionals about the specific issues you face in your role.
- Experience learning from a forum of your peers and discover best practices in other systems.
- Hear about strategies that could save your fund money in the short and long term.



Sponsorship and Exhibitor Opportunities

Opportunities are available for many of the events listed. See page 23 for more information.



IN-PERSON CONFERENCES

www.ifebp.org/education



Annual Wellness Summit

Preconferences available

August 3-5, 2027 | San Diego, California

The Annual Wellness Summit combines two long-standing events—the Wellness Council of America (WELCOA) Summit and the National Wellness Institute (NWI) National Wellness Conference—into one powerful gathering of wellness thought leaders, experienced practitioners and industry experts. Concurrent sessions will allow for a custom conference experience while offering meaningful opportunities to connect with the industry's top leaders.

Why You Should Attend:

- Walk away with new strategies, connections and resources.
- Get fresh information to advance well-being for yourself, your workplace and your community.
- Hear from experts on the latest trends and best practices for wellness.
- Participate in activities that prepare the mind and body for optimal learning.
- Evaluate current challenges and develop actionable solutions.



46th Annual ISCEBS Employee Benefits Symposium

September 19-22, 2027 | San Diego, California

Learn from industry colleagues, experts and leaders during this can't-miss event for corporate benefits professionals, benefits consultants, fund administrators and public plan employees.

Why You Should Attend:

- Maintain a competitive edge with engaging benefits knowledge.
- Learn strategies for a strong, comprehensive benefits approach.
- Gain connections to propel your career forward.



60th Annual Canadian Employee Benefits Conference

Preconferences: November 5-7, 2027

November 7-10, 2027 | Nassau, The Bahamas

The Annual Canadian Employee Benefits Conference celebrates 60 years in 2027! This conference is the premier source of comprehensive education needed to run benefit and pension plans effectively. Join us in Halifax for unbiased, objective education on upcoming trends, legislative changes and key topics impacting your fund. Gain the latest tools, ideas and strategies for making effective decisions on behalf of your plan members. Hear from experts in the industry, network with benefits professionals and share strategies on managing the funds you serve.

Why You Should Attend:

- Choose from a plethora of engaging sessions covering a wide range of issues and trends across pensions, benefits, investments, administration and more.
- Get the guidance you need from experts in the industry to manage your plans effectively today and prepare them for what's to come.
- Experience the Canada Connect Centre, now enhanced with service provider tabletop displays and engaging attendee activities.
- Walk away with a fresh perspective and new ideas.
- Plus de 12 sessions seront proposées en français, pour en savoir plus, rendez-vous à la page 14.



EDUCATION PATH FOR CANADIAN TRUSTEES

www.ifebp.org/cdtrusteepath

The Canadian trustee education path—Foundations of Trust Management Standards (FTMS), Advanced Trust Management Standards (ATMS), Master of Trust Management Standards (MTMS) and MTMS Advanced Leadership Summit—provides clear, cohesive training for all experience levels.

Together, these courses lay out the ideal blend of knowledge, skills and experience needed for the effective management of trusts. Past attendees recommend leaving time between each step on the path to apply what you've learned in the classroom to real-life situations.



Foundations of Trust Management Standards (FTMS)

June 14-15, 2027 | Vancouver, British Columbia

November 5-6, 2027 | Nassau, The Bahamas

The first step in the trustee education path is focused on the needs of new Canadian multi-employer, public and corporate sector plan trustees. FTMS will help you understand the health and retirement needs of plan members while increasing your knowledge and awareness in the key areas of effective trust management: legal and regulatory issues, administration, governance and funding/investment/finance.



Advanced Trust Management Standards (ATMS)—Sessions A and B

November 7-8, 2026 | Nassau, The Bahamas

June 14-15, 2027 | Vancouver, British Columbia

August 7-8, 2027 | Halifax, Nova Scotia

November 5-6, 2027 | Nassau, The Bahamas

Designed for the needs of experienced trustees, ATMS will give you the tools you need to not only be successful in your role as a trustee but also look toward the future and prepare your plan for the challenges ahead. For trustees who have either completed the FTMS program or passed the ATMS Qualifying Test, ATMS focuses on the application and analysis of the key knowledge areas—adding breadth and depth to what is learned in FTMS and deepening the pension and health and welfare applications.



Master of Trust Management Standards (MTMS)—Sessions A and B

June 16-17, 2027 | Vancouver, British Columbia

November 5-6, 2027 | Nassau, The Bahamas

For those who have completed both FTMS and ATMS, MTMS provides valuable knowledge to organizational leaders who are ready to leverage their own unique leadership strengths and skills to optimize their contributions. Mock board meetings challenge trustees to apply new skills to solve real-life circumstances and scenarios.

You'll learn to engage and develop others—all with the aim of strengthening your plan or trust for the long-term benefit of your members.



MTMS Advanced Leadership Summit

November 7, 2027 | Nassau, The Bahamas

The MTMS Advanced Leadership Summit is a continuing education program for those who have earned an MTMS credential. MTMS graduates will have the opportunity to continue their learning and develop deeper knowledge in relevant topics critical to a fund's overall strategy.

Employee Benefits Courses and Certificates

IN-PERSON COURSES

These instructor-led courses combine history and terminology with current events for a comprehensive learning experience. Find solutions for today's challenges and prepare for tomorrow's opportunities with in-person training that combines valuable learning materials, instruction and networking. www.ifebp.org/benefitscourses

Build a personalized educational experience that works for you!

Step 1) Select a two-day, in-person course. **Step 2)** Take three courses to earn a topic-specific Certificate of Achievement.

Canadian Benefits Plan Administration

Explore an introduction to the world of Canadian employee benefits, pensions and human resources practices. Gain a comprehensive understanding of the business environment and delve into the complexities of health care and retirement systems. www.ifebp.org/canbenplanadmin

Upcoming: **October 2-3, 2026 | Orlando, Florida • September 13-14, 2027 | Chicago, Illinois**

Communicating Employee Benefits

Home in on effective communication strategies for employee benefits, covering best practices, new technologies and how to measure success. Learn from experts and peers to enhance your communication approaches, ensuring your plans are more engaging and impactful for participants. www.ifebp.org/communicating

Upcoming: **October 2-3, 2026 | Orlando, Florida • April 16-17, 2027 | Seattle, Washington
September 17-18, 2027 | Chicago, Illinois**

Global Benefits: Regional Compliance and Trends

International benefits professionals will gain an understanding of variations in benefit programs worldwide and stay current on economic and workforce trends in global regions and specific countries. www.ifebp.org/globaltrends

Upcoming: **September 30-October 1, 2026 | Orlando, Florida • April 14-15, 2027 | Seattle, Washington
September 17-18, 2027 | Chicago, Illinois**

Global Benefits Strategy

Gain the knowledge and strategies needed to administer and manage a global benefits program. This course will help practitioners strengthen their global benefits expertise and better support a diverse, international workforce. www.ifebp.org/globalstrategy

Upcoming: **September 28-29, 2026 | Orlando, Florida • April 12-13, 2027 | Seattle, Washington
September 15-16, 2027 | Chicago, Illinois**

Organizational Strategies for Health and Financial Wellness

Equip yourself with the tools to promote holistic employee well-being, addressing the health and savings disparities intensified by the pandemic and inflation. Explore tailored strategies to enhance physical and financial well-being, leaving with actionable approaches to boost employee engagement and meet diverse workforce needs. www.ifebp.org/orgstrategies

Upcoming: **April 16-17, 2027 | Seattle, Washington**

Additional Courses (Focused on U.S. Benefits Management):

- 401(k) Plans
- Ancillary Benefit Plans
- Basic Compensation Concepts
- Basics of Employee Benefits Administration
- Funding and Finance of Health Benefits
- Health Benefit Plan Basics
- Health Care Cost Management
- Introduction to Public Sector Benefits Administration
- Investment Basics
- Multiemployer Plan Administration
- Public Sector 401, 403 and 457 Plans
- Retirement Plan Basics
- Total Rewards and Workforce Strategies

Employee Benefits Courses and Certificates

IN-PERSON CERTIFICATES

Take three designated employee benefits courses to earn a topic-specific Certificate of Achievement.

www.ifebp.org/benefitscourses

Certificate in Canadian Benefits Management

Gain a comprehensive understanding of Canadian employee benefits as well as best practices for total rewards and benefits management globally. www.ifebp.org/canadacert

Required Course:

- Canadian Benefits Plan Administration

Elective Courses—Choose Two:

- Canadian Total Rewards (Virtual Course)
- Communicating Employee Benefits
- Global Benefits Strategy
- Total Rewards and Workforce Strategies (U.S.)

Certificate in Global Benefits Management

The new world of work, with its dispersed workforces and greater global mobility, is a challenging environment for multinational employers. This certificate provides a thorough education in the critical areas of global benefits management. Global industry experts will provide a solid foundation in international benefits and an enhanced understanding of the differences in benefit packages offered around the world. www.ifebp.org/globalcertificate

Required Courses:

- Global Benefits: Regional Compliance and Trends
- Global Benefits Strategy

Elective Courses—Choose One:

- Canadian Benefits Plan Administration
- Communicating Employee Benefits
- Organizational Strategies for Health and Financial Wellness

Additional Certificates (*Focused on U.S. Benefits Management*):

- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Health and Welfare Plans
- Certificate in Multiemployer Plan Administration
- Certificate in Public Sector Benefits Administration
- Certificate in Retirement Plans
- Certificate in Strategic Benefits Management

Find more details on these courses and certificates
at www.ifebp.org/benefitscourses.

ÉVÉNEMENTS ET PROGRAMMES EN FRANÇAIS

fr.ifebp.ca

La Fondation internationale pour les avantages sociaux poursuit le développement de notre offre éducative en français afin de répondre aux besoins grandissants des membres et des professionnels francophones. Continuez de visiter notre site Web ainsi que notre page LinkedIn pour découvrir les plus récentes nouveautés et mises à jour.

EN PERSONNE



27^e Séminaire sur la gestion des caisses de retraite

6 mai 2027 | Montréal, Québec

Joignez-vous au Palais des congrès de Montréal pour une journée de formation et de discussions stratégiques réunissant les experts du secteur pour faire le point sur les tendances qui façonnent l'avenir de la retraite.

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60^e Conférence annuelle canadienne sur les avantages sociaux

7 au 10 novembre 2027 | Nassau, les Bahamas

La conférence annuelle canadienne sur les avantages sociaux demeure le plus grand rassemblement au pays dédié aux régimes de retraite, aux avantages sociaux et au bien-être en milieu de travail. Chaque année, trois journées de sessions réunissent des dirigeants, administrateurs, fiduciaires, conseillers et experts de tous les secteurs pour échanger sur les tendances qui transforment le monde des avantages sociaux au Canada. Plus qu'une conférence, il s'agit d'une occasion unique d'apprentissage et de réseautage favorisant le partage de connaissances et de pratiques exemplaires au sein de la communauté.

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APPRENTISSAGE VIRTUEL

Explorez nos nombreuses options d'éducation virtuelle :

- webinaires
- certificats d'apprentissage en ligne.

Canadian **Investment** Institute

November 9-11, 2026

The Royal at Atlantis Paradise Island | Nassau, The Bahamas

www.ifebp.org/canadainvest

In times of uncertainty, education serves as the cornerstone for smart, reasonable decision making. Now is the time to take advantage of every opportunity to gather the insights and knowledge that will strengthen your investment strategy.

The Canadian Investment Institute is designed to help you navigate the investment challenges you are facing while offering a clear perspective on how to best prepare your funds. Developed by Canadian trustees and investment professionals who understand your realities, this program will help you make more informed decisions and strengthen the funds you serve.

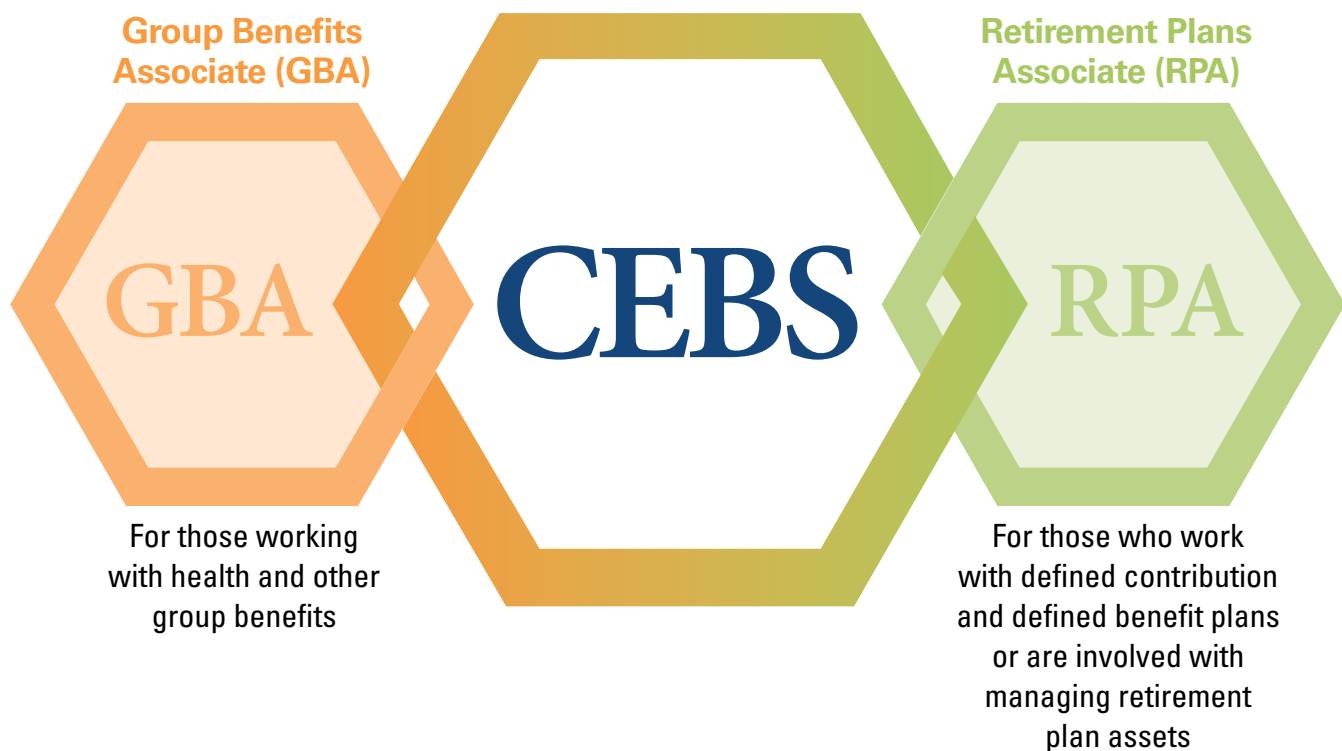


REINVESTING IN CANADA

EMPLOYEE BENEFITS DESIGNATIONS

Self-Study | Virtual Exams | Online Study Groups Available

The **Certified Employee Benefit Specialist® (CEBS®)**, **Group Benefits Associate (GBA)** and **Retirement Plans Associate (RPA)** designations are highly regarded in the employee benefits industry. The curriculum is developed by Dalhousie University and is supported by research-based best practices. Whether you are looking to break into the industry, currently work in employee benefits or are an experienced benefits professional, these three designations provide the knowledge you need to tackle challenges you will face throughout your career.



COMPLIMENTARY WEBINAR

Your Complete Guide to Earning the CEBS Designation

Want to know more about CEBS? Attend a free, 30-minute webinar and Q&A session (or watch a recording of a previous webinar).
www.cebs.org/webinar

SAVE 20%
WITH A SUCCESS PACKAGE

Each package has the key elements you'll need to jump-start your CEBS journey—the Online Study Group With Instructor Support and its corresponding exam.

A JOINT PROGRAM WITH

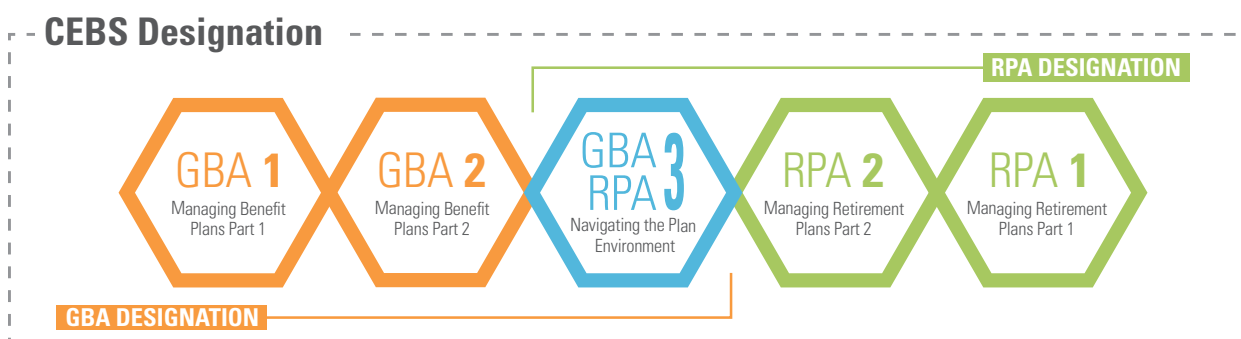


DALHOUSIE
UNIVERSITY

CEBS COURSES—TOPIC STRUCTURE

www.cebs.org

To earn the full CEBS designation, complete the five required courses. To earn the GBA or RPA designation, complete a specified combination of three courses (all counting toward the full CEBS designation).



GBA 1	GBA 2	GBA/RPA 3	RPA 2	RPA 1
Managing Risk in Benefit Plans	Managing Death Benefits	Optimizing Social Programs in Planning for Retirement and Health Security	Navigating the Investment Environment of Employer-Sponsored Retirement Plans	Designing Registered Pension Plans
Leveraging the Benefits Plan Management Function	Managing Death Benefits Continued	Optimizing the Canada Pension Plan/Québec Pension Plan (CPP/QPP) for Income Security	Inventoring the Major Asset Classes	Designing Non-Pension Registered Retirement Plans
Applying Functional Analysis to Benefit Plans	Managing Short-Term Income Replacement Benefits	Optimizing Canada's Social Security System—Employment Insurance and Workers' Compensation	Managing Investment Risk and Return	Leveraging the Tax Regime in Plan Design
Designing Benefit Plans	Managing Long-Term Disability Benefits	Optimizing Canada's Social Security System—Health Care	Constructing an Investment Portfolio—Part 1	Complying With Pension Standards Legislation
Funding Benefit Plans	Effective Disability Plan Management	Driving Plan Sponsor Strategy With Reward and Compensation Systems	Constructing an Investment Portfolio—Part 2	Establishing Effective Governance
Administering Benefit Plans	Leveraging the Tax Regime in Health and Dental Plan Management	Driving Behaviour With Reward and Compensation Systems	Evaluating Active Management Performance	Administering Retirement Arrangements
Processing Benefit Plan Claims	Managing Extended Health Care Benefits	Thinking Through a Risk Management Lens	Leveraging Managed Funds to Achieve Investment Objectives	Optimizing Plan Funding and Financial Reporting
Initial Pricing of Group Insurance Products	Managing Dental Benefits	Establishing Risk Governance and Culture	Complying With Legislative and Best Practices in Plan Asset Investment	Managing Retirement Plan Assets
Establishing Renewal Rates for Group Insurance	Managing Employee/Member Assistance and Wellness Programs	Integrating Risk Management Into Strategy Setting and Execution	Developing the Statement of Investment Policy	Addressing Special Provisions—Multi-Employer Pension Plans
Marketing a Group Insurance Plan	Managing Flexible Benefit Plans	Optimizing Risk Communication, Reporting and Monitoring to Improve Decision Making	Implementing the Defined Benefit Pension Plan Investment Policy	Managing Special Situations—Plan Terminations, Surplus in Ongoing Plans and Business Reorganizations
			Implementing the Capital Accumulation Plan Investment Policy	Other Employer-Sponsored Plans

CUSTOMIZED EDUCATION BROUGHT DIRECTLY TO YOUR TEAM

www.ifebp.org/onsite-education

The Foundation's flexible on-site or online training brings industry-leading employee benefits education to your workplace. As your partner in education, we work with you to meet your unique training goals. With more than 65 years as a leading employee benefits education provider, we can help you prioritize your objectives and provide a cost-effective solution to meet your unique needs. Whether it's in-person education or online learning, we offer both off-the-shelf and customized training solutions.



IN PERSON

Bring the experts to you—your city, your workplace, your staff. Having a subject matter expert at your organization allows for a one-of-a-kind learning and team-building experience.



E-LEARNING COURSES

Industry-leading online education provides comprehensive and interactive training for your staff. Choose from eight e-learning courses that can be housed on your internal LMS for easy tracking.



WEBCASTS

Offering a series of webcasts is a cost-effective and convenient way to train staff wherever they are located. Interact directly with subject matter experts who can address your specific issues.

Our Most Popular Options for On-Site Training Include:

FTMS | FOUNDATIONS OF
TRUST MANAGEMENT
STANDARDS®

ATMS | ADVANCED TRUST
MANAGEMENT
STANDARDS®

We also provide customized training solutions in areas including:

- Administration
- Apprenticeship management
- Communications
- Compensation
- Conflict resolution
- Diversity training
- Fiduciary responsibility
- Funding methods
- Governance
- Harassment training
- Investments
- Legal/compliance
- Management/leadership
- Retirement plans
- Service provider relations
- Strategic planning
- Supplemental group health plans.

ONLINE LEARNING

www.ifebp.org/online

Online education from the International Foundation is ideal for any learner. Whether you're just starting your career in pensions or group benefits and need to get quickly up to speed, or you're a seasoned professional looking for in-depth, topic-driven content, online learning has you covered. Select the training that satisfies your unique needs—wherever your location.



E-LEARNING COURSES*

Learn on your schedule with self-paced online courses developed by industry experts.



ONLINE CERTIFICATES*

Complete a series of e-learning courses and gain a solid foundation of knowledge in a specific employee benefits discipline.



VIRTUAL CONFERENCES*

Attend the International Foundation conferences you love from the comfort of your home or office.



VIRTUAL WORKSHOPS

Meet virtually with a subject matter expert and a small group of your peers for interactive training that you can immediately apply to your daily work.



WEBCASTS*

Keep your finger on the pulse of current issues facing the benefits industry by accessing both live and recorded webcasts that are free to International Foundation members!



**Offered in French or can be made available in French. Learn more at fr.ifebp.ca.*

VIRTUAL EDUCATION

www.ifebp.org/onlineworkshops



Mental Health in the Workplace ME PE CP

October 7, 2026 | Virtual Conference

Organizations continue to face challenges with how to respond to their participants' mental health needs and foster a healthy work environment. This event will provide best practices for when, where and how employers can support the total well-being of their employees and their families.



Advanced Pensions Certificate CP

November 18-19, 2026 | Virtual Certificate

Designed for those with experience in the retirement savings industry, this certificate provides advanced-level pension and investment content across four main modules: governance, defined benefit plans, defined contribution plans and investments.



Global Benefits Fundamentals CP G

December 8-9, 2026 | Virtual Course

This live, online course is for those new to global employee benefits, including those who have significant benefits experience in their home country but limited exposure to benefits at a multi-national company. The content will bring awareness to the range of issues that a global benefits professional may encounter over the course of their career, including topics on culture, health care options and the legal landscape.



Institute for Apprenticeship, Training and Education Programs ME PE

January 25-27, 2027 | Virtual Conference

Enjoy added flexibility through a virtual offering of the Institute for Apprenticeship, Training and Education Programs. This conference will address the current and relevant issues that are impacting your program, providing the clarity you need to plan for the future. Learn from experts and share ideas, opportunities and lessons learned with your peers so you walk away with actionable plans to implement.

ONLINE CERTIFICATES

www.ifebp.org/canada-certificates

FUNDAMENTALS IN GROUP BENEFITS

Explore group benefits from a variety of perspectives to understand the process as a whole. Differentiate between the plan sponsor's and insurer's roles and responsibilities regarding the management of a group benefits plan, including plan design, funding, pricing, claims and premium administration, communication and the renewal process.



The Group Insurance Landscape



Group Benefits Funding and Pricing



Group Benefits Design and Administration



Life Cycle of a Group Benefits Plan

FUNDAMENTALS IN RETIREMENT PLANS

Gain a solid understanding of retirement income needs and how retirement plans work to meet those needs. Learn about the various types of registered and nonregistered pension and savings plans, and take a deep dive into the intent and application of the Capital Accumulation Plan (CAP) Guidelines and the Canadian Association of Pension Supervisory Authorities (CAPSA) governance guidelines.



The Retirement Landscape



Retirement Plan Sponsor Responsibilities



Employer-Sponsored Retirement Plans



Life Cycle of a Group Retirement Plan

Take all four Fundamentals in Group Benefits or Fundamentals in Retirement Plans courses to earn a certificate—or take the courses individually. And remember, International Foundation members get a discount!

Ces certificats sont désormais disponibles en français!
Pour en savoir plus, rendez-vous sur : fr.ifebp.ca/enligne

E-learning courses qualify for CEBS Compliance credit. Insurance professionals licensed in Alberta, British Columbia, Manitoba, Saskatchewan and Ontario can use Canadian e-learning courses to meet continuing education requirements.

E-LEARNING COURSES

www.ifebp.org/elearning



The Group Insurance Landscape

Learn what insurance is, why it is needed and the common benefits provided under group benefits plans. This course focuses on the relationships among the parties of a group insurance contract—the plan sponsor, insurer, plan advisors and plan members.



Group Benefits Funding and Pricing

Discover the traditional funding methods used for group benefits plans, the factors that impact a plan sponsor's choice of funding method and the basic methods of pricing group insurance. Additionally, gain an overview of factors that insurers consider in the renewal rating process.



Group Benefits Design and Administration

Understand the plan sponsor's role in group benefits plan management. This course provides an overview of key requirements related to group benefits design, claims administration, premium administration, recordkeeping and communication.



Life Cycle of a Group Benefits Plan*

Understand the insurer's role and responsibilities at all stages of a group benefits plan life cycle—prospecting, quoting/selling, implementing, servicing, renewing and terminating. Ethical decision making is examined from the perspectives of all parties involved.



The Retirement Landscape

Gain a basic understanding of what retirement income needs are and how retirement plans work to meet those needs. This course introduces the three pillars of the retirement system and outlines the key characteristics and the prevalence of registered and nonregistered plans.



Retirement Plan Sponsor Responsibilities

Gain a detailed explanation of the Capital Accumulation Plan (CAP) Guidelines and the Canadian Association of Pension Supervisory Authorities (CAPSA) governance guidelines. Review their significance for plan sponsors, plan members and insurers and highlight key differences between the two.



Employer-Sponsored Retirement Plans

Explore an overview of benefits arising from a registered pension plan on retirement, termination of employment or death. Learn various types of defined benefit registered pension plans and nonregistered savings plans as well as the pros and cons for employees and employers.



Life Cycle of a Group Retirement Plan*

Understand the insurer's role and responsibilities at all stages of a capital accumulation plan (CAP) life cycle—prospecting, quoting/selling, implementing, servicing and terminating. Ethical decision making is examined from the perspectives of all parties involved.



Financial Skills for Life: An Introduction to Personal Finance

This online course is designed specifically for younger workers who need education on the basics of managing their personal finances. Learn more at www.ifebp.org/financial-skills.

Ce cours est disponible en français. Pour en savoir plus, rendez-vous sur : fr.ifebp.ca/introduction-finances

**This course is available to all individuals. It is, however, designed to complete the curriculum for those who work for a member company of CLHIA and need to meet the Proficiency Standards.*

The International Foundation would like to acknowledge the Canadian Life and Health Insurance Association (CLHIA) and the member companies of CLHIA for sharing their vision and expertise in working with Dalhousie University as well as for their financial support to develop the courses.

www.ifebp.org/reachourmembers

A woman in a red patterned dress stands next to a white tote bag with the 'yeah baby' logo on a chair, talking to a woman in a white jumpsuit. A sign for 'Gynny' is visible in the background.

Generate meaningful connections and drive business growth by exhibiting at one of the following conferences.

- Build relationships with key decision makers by sponsoring one of the following conferences.

- [illegible]

Promote your organization in our publications! Our niche audience consists of over 30,000 employer trustees, administrators and benefit plan professionals. Print and digital options are available.

- [illegible]



INTERNATIONAL FOUNDATION MEMBERSHIP

www.ifebp.org/membership

The International Foundation covers trending topics, breaking compliance updates and legislative updates. Our resources will help you:

Members get discounted event registration—often covering the cost of membership!



STAY COMPLIANT

Legislative and Regulatory Updates

Find vetted, expertly curated updates on issues impacting the pensions and benefits landscape.

Today's Headlines

Stay ahead of benefit regulations with daily compliance alerts, benefits news stories, and industry legislative and regulatory updates.



MAKE CONNECTIONS

Jobs in Benefits/ Career Resource Center

Find your next great hire, develop your career as a benefits professional, learn the latest trends in benefits and get an idea of salaries in your field.

Community

Chat directly with your peers, connect, share best practices, and learn with other members who share your interests and concerns.



The International Foundation is the only organization that provides the type of education trustees need to manage trust funds with respect to all types of benefits, apprenticeship and pension plans.

Tony Fanelli

Teamsters National Pension Plan



I greatly value the Foundation's ongoing learning resources, including personalized research services, webcasts and *Today's Headlines*. These tools keep me current, informed and supported in navigating the complex pension, benefits and governance landscape.

Troy Clifford, MTMS

Public Service Pension Plan Board
of British Columbia



SAVE TIME

InfoQuick

Instantly access resources amongst over 100 frequently asked questions about industry topics, saving hours of searching time.

Sample Documents

Enough starting from scratch—View sample policies, forms, RFPs, checklists and other documents first.

Personalized Research Service

Save hours of time by letting one of our information specialists handle your complicated benefits questions.

Benchmarking Survey Reports

Access difficult-to-find details and benchmarking tactics to address the challenging benefits environment. Recent reports cover GLP-1 drug coverage, apprenticeship program trends, mental health and substance use disorder benefits.



LEARN FROM THE EXPERTS

Webcasts

Gain just-in-time information on developing benefit issues, delivered by experts, with unlimited live and on-demand webcasts.

Plans & Trusts Magazine

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month.

Toolkits

Find expertly curated resources on topics impacting you and your plans including DEI, mental health, financial education and retirement security, benefits communication and more.

CONTINUING EDUCATION

www.ifebp.org/ce

International Foundation programs and courses are regularly approved to fulfill continuing education (CE) requirements for professional licences, certifications and designations.

Lawyers

For seminars and conferences, continuing professional development can be earned in many provinces. The International Foundation seeks approval of seminars and conferences from province law societies based on requests for CE credit on program registration forms. Credit for self-study courses is subject to individual province regulations.

Insurance Agents

The International Foundation seeks approval of seminars and conferences from province insurance departments based on requests for CE credit on program registration forms. It is important to register at least 60 days in advance of the program so that credit can be sought. Due to the approval process by the Chambre de la sécurité financière, insurance CE credit is not available in Québec.

CEBS Compliance

To attain the status of CEBS Compliant, graduates need to report 30 hours of eligible activities during a two-year period. The chosen activity must cover one or more of the CEBS content domain topics, which can be found at www.cebs.org/compliance. CEBS graduates of Canada and the U.S., of any year, are eligible to participate to attain this additional level of recognition. Most education programs sponsored by the International Foundation or the International Society of Certified Employee Benefit Specialists (ISCEBS) qualify for CEBS Compliance credit, including:



- Attendance at an International Foundation in-person conference
- Attendance at the ISCEBS Symposium
- CEBS courses not taken to originally earn the CEBS designation
- International Foundation webcasts or e-learning courses
- Attendance at an ISCEBS local chapter educational program.

Credit Hours

Credit hours and filing procedures vary by discipline and province. Please visit our website at www.ifebp.org/ce or contact the International Foundation Continuing Education Department for more information at (833) 886-3749, option 2, or continuinged@ifebp.org.

FOR MORE INFORMATION, contact the International Foundation Continuing Education Department.

Phone: (833) 886-3749, option 2
Email: continuinged@ifebp.org
Online: www.ifebp.org/ce

GET INVOLVED

www.ifebp.org/getinvolved

The ongoing success and quality of the International Foundation's products and services are due in large part to the collective efforts of its volunteers—those with a commitment to education and a willingness to donate extra time to support the advancement of a challenging industry. We encourage you to join that special group of leaders.

Here's How You Can Increase Your Personal Involvement:

ENGAGE

Connect With and Leverage Your Community

Share best practices and find solutions on the Foundation Community. You can also connect with colleagues, fellow members and information on Foundation social networks. Nowhere else will you find people who understand your challenges quite like this community does!

SHARE

Speak, Present, Author

Don't keep your knowledge to yourself! Help others in the trenches by sharing your ideas and thought leadership through authoring a magazine article or presenting a conference session or webcast. You could also moderate a session or serve as a discussion leader.

LEAD

Serve on a Committee

Take an active part in developing products and services and charting courses of action for the International Foundation by volunteering for a board or committee. Any member of the International Foundation can be nominated. Submit your information or nominate a colleague. We'd love to hear from you.

www.ifebp.org/getinvolved





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I have been attending training with the International Foundation for almost 20 years and highly recommend their conferences to my fellow benefit professionals.

Michael Kimmis
British Columbia
Teachers' Federation



Education from the International Foundation is a must first step for any trustee wishing to operate in an effective, efficient and above all ethical manner at all times.

Sharon Penney
NLTA



The International Foundation has been a very valuable resource in the performance of my duties as a trustee.

Steve Berry
UA Local 46