

EMPLOYEE BENEFITS EDUCATION 2026-2027

FUEL YOUR WORK THROUGH EDUCATION

THE ACTIONS OF OUR BENEFITS COMMUNITY
IMPACT THE LIVES OF MILLIONS OF WORKERS.

WHY CHOOSE THE INTERNATIONAL FOUNDATION FOR YOUR EDUCATION?

If you work with employee benefit plans, no day is ever the same. You need a source for objective, impartial and high-quality education to stay compliant and well-informed. Since 1954, the Foundation has served as the largest organization for employee benefits education. Our focus is:

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

“The International Foundation continues to be an unbiased source of education, information and access to tools, resources and professionals that support and advance my career.

Renee Albert, GBA
Lyra Health

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

Choose from
over 11
in-person
conferences

Learn from
wherever you are
through
4
virtual certificates

Find 64
in-person opportunities
to train specifically
for your role

Benchmark
your plans
through 11
survey reports

Stand out
with 16
certificates
(in person or online)

Dig into the
details through
16
toolkits

Brush up on
important topics
through 46
e-learning courses

Demonstrate your
commitment to
the industry
with 3
professional
designations

Learn from an
organization with
over 70 years
of benefits education
experience

Tune into
34
recent
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 catalog so you know what to look for, depending on your role.

COMPLIANCE AND BENEFITS MANAGEMENT

In-person conferences:

- Accounting and Auditing Institute for Employee Benefit Plans
- Annual Employee Benefits Conference
- ISCEBS Employee Benefits Symposium
- Washington Legislative Update

In-person certificates:

- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Canadian Benefits Management
- Certificate in Global Benefits Management
- Certificate in Multiemployer Plan Administration
- Certificate in Strategic Benefits Management

In-person courses:

- Ancillary Benefit Plans
- Basic Compensation Concepts
- Basics of Employee Benefits Administration
- Communicating Employee Benefits
- Global Benefits Strategy
- Multiemployer Plan Administration
- Total Rewards and Workforce Strategies

FIDUCIARY MANAGEMENT

In-person conferences:

- Advanced Trustees and Administrators Institute
- Annual Employee Benefits Conference
- TMP Advanced Leadership Summit

In-person courses:

- Collection Procedures Institute
- New Trustees Institute—Level I: Core Concepts
- Trustees Institute—Level II: Concepts in Practice
- Trustees Masters Program (TMP)

HEALTH CARE

In-person conferences:

- Annual Employee Benefits Conference
- Health Benefits Conference & Expo (HBCE)
- Health Care Management Conference
- ISCEBS Employee Benefits Symposium

In-person certificates:

- Certificate in Health and Welfare Plans

In-person courses:

- Funding and Finance of Health Benefits
- Health Benefit Plan Basics
- Health Care Cost Management

ORGANIZATIONAL WELLNESS

In-person conferences:

- Annual Wellness Summit
- Art & Science of Health Promotion Conference
- Health Benefits Conference & Expo (HBCE)

In-person courses:

- Organizational Strategies for Health and Financial Wellness

SPECIALIZED TRAINING

In-person conferences:

- Institute for Apprenticeship, Training and Education Programs

In-person courses:

- Designing Curriculum to Close the Skills Gap
- Understanding Negotiated Employee Benefits

PUBLIC EMPLOYERS

In-person conferences:

- Annual Employee Benefits Conference
- ISCEBS Employee Benefits Symposium

In-person certificates:

- Certificate in Public Sector Benefits Administration

In-person courses:

- Introduction to Public Sector Benefits Administration
- Public Plan Trustees Institute—Level I and Level II
- Public Sector 401, 403 and 457 Plans

RETIREMENT/INVESTMENTS

In-person conferences:

- Annual Employee Benefits Conference
- Investments Institute
- ISCEBS Employee Benefits Symposium

In-person certificates:

- Certificate in Retirement Plans

In-person courses:

- 401(k) Plans
- Investment Basics
- Portfolio Concepts and Management
- Retirement Plan Basics

ONLINE LEARNING

Seven online certificates and 40+ e-learning courses cover a range of topics. See pages 26-34 for a full listing.

MAKE THE MOST OUT OF THIS CATALOG

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:

CORPORATE PLANS

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

GLOBAL PLANS

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

MULTIEMPLOYER PLANS

Also known as Taft-Hartley plans in the U.S., 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, Labor Relations Director, Executive Director, Fund Administrator, Business Manager, Training Coordinator, Secretary-Treasurer

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: State, 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

Also note the different delivery methods of education throughout:

In-person
conferences

In-person
courses

In-person
certificates

Online
certificates

E-learning
courses



As a new member, I am encouraged by the focus and priority put on education that meets people where they are.

Jason Kaseman
Central Ohio Retail
Pension Fund



For those who work
with multiemployer or
public benefit plans ...

72nd ANNUAL

Employee Benefits Conference



Virtual option available | Preconferences available

October 25-28, 2026

New Orleans, Louisiana

www.ifebp.org/usannual

What you know can make a big difference in what you do. Expand your learning and rewrite what it means to be an exceptional trustee or administrator at the 72nd Annual Employee Benefits Conference. Join 5,000 of your fellow employee benefits peers from across the country as you learn through ten tracks representing over 120 sessions. This is the only event where you'll gain knowledge from those who truly understand your day-to-day challenges.

Who Should Attend:

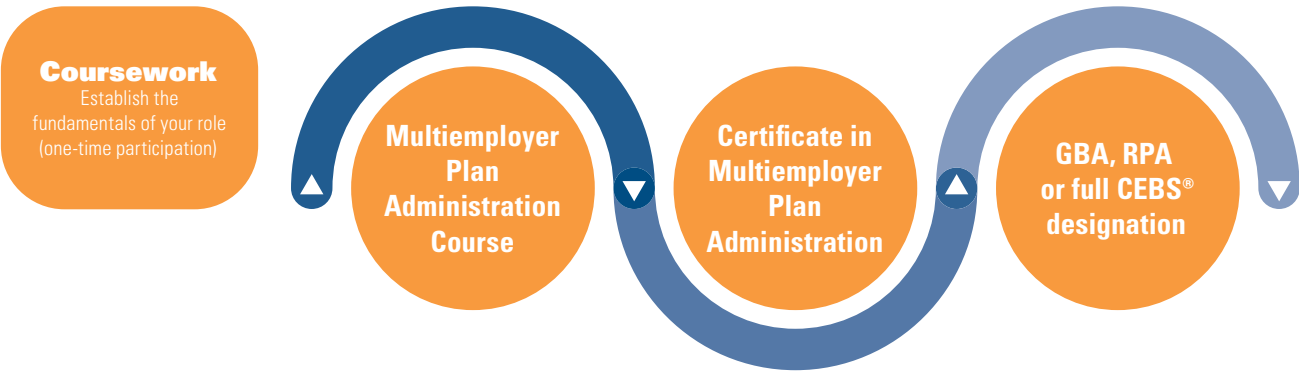
- Taft-Hartley fund trustees, administrators, business managers and association leaders
- Public sector plan trustees and staff
- Fund administrators and managers
- Third-party administrators (TPAs)
- Benefit consultants
- Attorneys, accountants and actuaries
- Investment managers and consultants
- Coalition leaders
- Others who are involved in the overall management and administration of benefit trust funds

SAVE THE DATE!

73rd Annual Employee Benefits Conference
San Antonio, Texas | October 17-20, 2027

EDUCATION PATHS

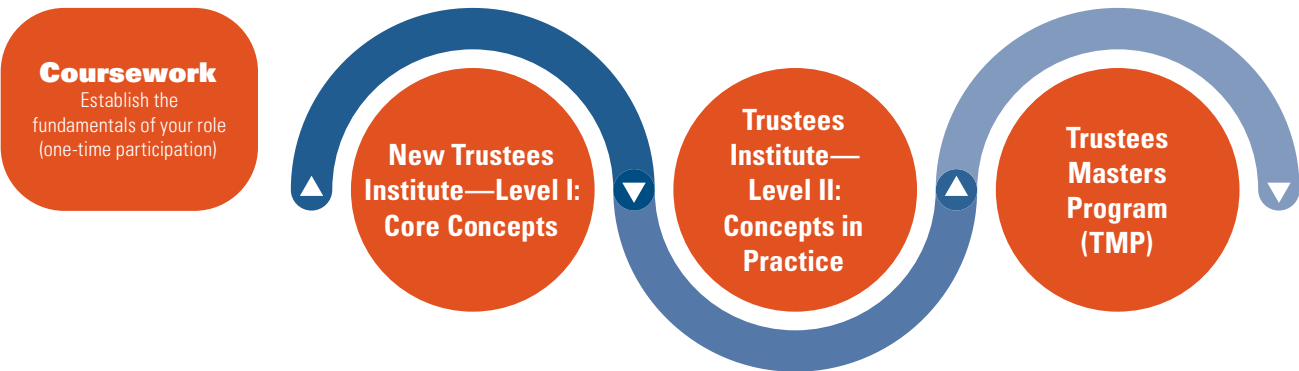
Multiemployer **Administrators and Staff** Education Path



Conferences
Learn about new trends impacting your role (content changes annually)

- U.S. Annual Employee Benefits Conference
- Accounting and Auditing Institute for Employee Benefit Plans
- Advanced Trustees and Administrators Institute
- Annual Wellness Summit
- Collection Procedures Institute
- Fraud Prevention Institute for Employee Benefit Plans
- Health Care Management Conference
- ISCEBS Employee Benefits Symposium
- Washington Legislative Update

Multiemployer **Trustees and Fiduciaries** Education Path

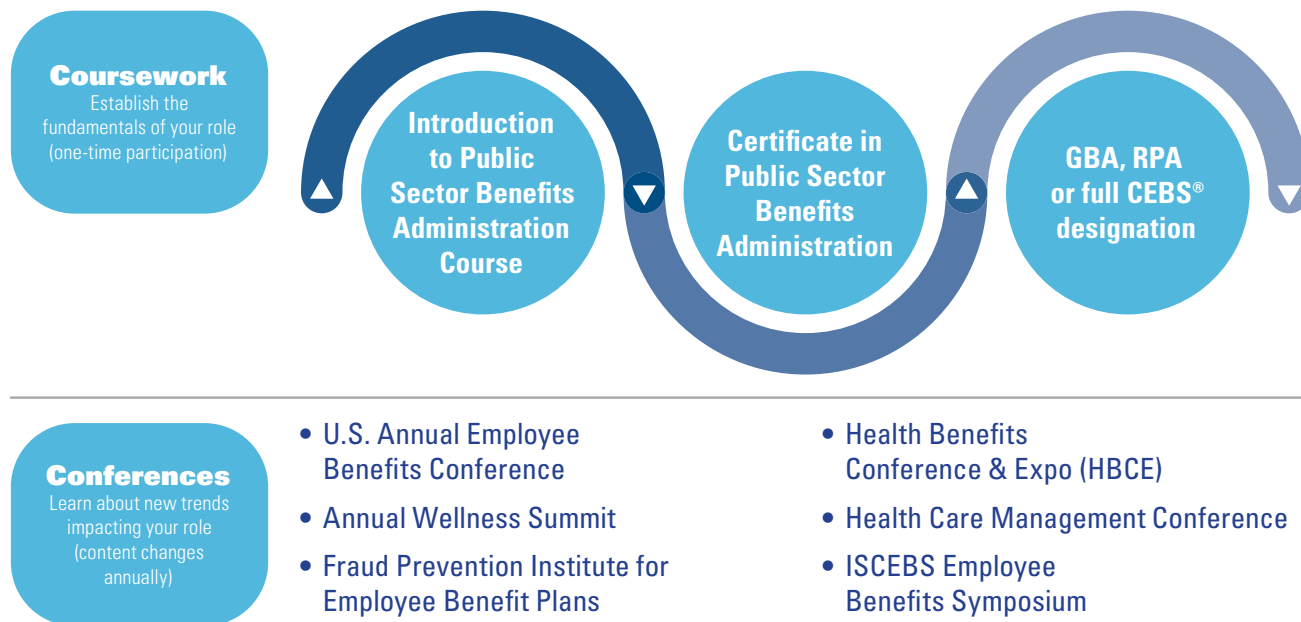


Conferences
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- U.S. Annual Employee Benefits Conference
- Advanced Trustees and Administrators Institute
- Collection Procedures Institute
- Fraud Prevention Institute for Employee Benefit Plans
- Health Care Management Conference
- Institute for Apprenticeship, Training and Education Programs
- Investments Institute
- Portfolio Concepts and Management
- TMP Advanced Leadership Summit
- Washington Legislative Update

EDUCATION PATHS

Public Employer **Administrators and Staff** Education Path



Public Employer **Trustees and Fiduciaries** Education Path





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

45TH ANNUAL
ISCEBS Employee Benefits
Symposium

PE CP

August 23-26, 2026 | Phoenix, Arizona

www.ifebp.org/symposium

The Symposium is one of the largest gatherings of benefits professionals in the country hosted by one of the International Foundation's affiliate organizations, the International Society of Certified Employee Benefit Specialists (ISCEBS). 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 health 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.

SAVE THE DATE!

46th Annual ISCEBS Employee Benefits Symposium
September 19-22, 2027 | San Diego, California

IN-PERSON CONFERENCES

www.ifebp.org/education



Health Care Management Conference

April 20-21, 2026 | Austin, Texas



Health plan trustees and administrators are responsible for designing coverage that is cost-effective, attains the highest health outcomes and is equitable for all, but it's easy to fall off track. The Health Care Management Conference is designed to explore how to create a better plan for your entire fund through the whole-worker approach, focusing on how the health plan supports workers' physical, mental and professional well-being.

Why You Should Attend:

- Learn what's on the horizon for the prescription drug landscape and how to meet the needs of participants while controlling costs.
- Discover the importance of connecting health, safety and well-being initiatives into a trust fund environment.
- Find out the latest cost-containment strategies and what's working for other trustees and administrators.
- Learn what offerings your organization should consider for family-friendly benefits.



Investments Institute

April 22-23, 2026 | Austin, Texas



Learn from highly regarded experts in the field of investing, hear current perspectives on the global economy and discuss your fund's strategies with trustees from other funds. Discover alternative investment options and get key questions answered that will help enhance your fund's investments.

Why You Should Attend:

- Hear from experts on the economic outlook so you can understand how these issues factor into the markets and shape the future for investors.
- Learn how you can protect your plan from inflation and how it's changing.
- Discuss misconceptions such as lock-up periods, fees and liquidity, and learn the questions you need to be asking managers.
- Discover trends in real estate in today's market.



Washington Legislative Update

May 18-19, 2026 | Washington, D.C.



Receive the latest need-to-know information on legislative changes impacting plans and plan participants, and gain the tools to prepare for what's ahead. Connect with your peers as you get the latest information and develop plans to address the challenges you face, such as the current political landscape, mental health and substance abuse, coverage for the LGBTQ+ community, the economy and the debt limit.

Why You Should Attend:

- Learn how to maximize your engagement efforts when meeting with government officials—from the details of the legislative process to the players who impact benefits.
- Connect with representatives from the key agencies (DOL, IRS, PBGC, HHS) responsible for enforcement and oversight in the employee benefits industry.
- Discover the latest changes to labor law and insight on what's ahead.
- Receive a health care update and learn more about retirement plan designs.

IN-PERSON CONFERENCES

www.ifebp.org/education



Accounting and Auditing Institute for Employee Benefit Plans

ME

Preconference available

June 15-17, 2026 | San Diego, California

Virtual option available

Do you audit employee benefit plans? It's a complicated industry—Make sure you're staying up to date on the latest in reporting and disclosure requirements by attending this event. Ask questions and learn from the experts so you can better understand the current issues impacting multiemployer pension and health and welfare plans.

Why You Should Attend:

- Get the most up-to-date information on plan disclosure requirements.
- Network with your peers who face similar challenges, and brainstorm workable solutions.
- Earn meaningful continuing professional education (CPE) credits.



Advanced Trustees and Administrators Institute

ME

Preconference available

June 15-17, 2026 | San Diego, California

February 15-17, 2027 | Orlando, Florida

Developed by active trustees, administrators and professional advisors, each session will address current issues, providing the relevant information you need to make sound decisions for your fund. Learn the latest industry trends and legal and regulatory changes, all while gathering new ideas and a deeper understanding of how to run your pension and health and welfare fund.

Why You Should Attend:

- Learn from industry experts about the current state of affairs and latest reform initiatives—Be prepared for what lies ahead.
- Network with peers who face similar challenges—Learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to implement.
- 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.



Annual Wellness Summit

PE CP

Preconferences available

July 28-30, 2026 | Nashville, Tennessee

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.



IN-PERSON CONFERENCES

www.ifebp.org/education



Presented by
ISCEBS

45th Annual ISCEBS Employee Benefits Symposium

August 23-26, 2026 | Phoenix, Arizona

PE CP

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.



72nd Annual Employee Benefits Conference

Preconferences available

October 25-28, 2026 | New Orleans, Louisiana

ME PE

The Annual Employee Benefits Conference is an event like no other. With over 120 sessions and ten tracks, this conference offers something for everyone. Join industry leaders and peers for hands-on workshops, thought-provoking panels and dynamic networking events to ensure you meet your fiduciary responsibilities.

Why You Should Attend:

- Get real answers on the topics you need to know about today along with proven solutions you can apply.
- Learn critical insights from 150 expert practitioners handpicked to guide you.
- Experience real-world, application-based learning opportunities.
- This premier conference brings together 5,000 employee benefits peers from across the country.

Preconference Workshops Include:

- Attorneys Only—Ethics and Diversity in Employee Benefits
- Benefit Plan Mergers Workshop
- Cybersecurity and Social Engineering Fraud
- Health, Wealth and Happiness—Planning Your Path to a Successful Retirement
- Mental Health First Aid® at Work
- Trustee and Administrator Succession Planning Workshop
- Understanding and Engaging Today's Workforce
- Understanding and Using the 7 Benchmarks for a Well Workplace
- You've Been Summoned—Best Practices in Litigation, Depositions and Trial Testimony



TMP Advanced Leadership Summit

October 25, 2026 | New Orleans, Louisiana

ME

Trustees Masters Program (TMP) graduates have the opportunity to continue their learning and delve deeper into relevant topics critical to a fund's overall strategy. The focus of the TMP Advanced Leadership Summit changes each year to reflect the most essential issues facing trustees.

Why You Should Attend:

- Gain practical tips to develop working relationships that operate with minimal conflict.
- Summit will count for two sessions toward the Annual Conference Certificate of Attendance.
- Connect with other TMP certificate holders.

IN-PERSON CONFERENCES

www.ifebp.org/education



Institute for Apprenticeship, Training and Education Programs

ME PE

Preconference available

January 25-27, 2027 | San Diego, California

Virtual option available

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 return 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.



36th Annual Health Benefits Conference & Expo (HBCE)

PE CP

Preconference available

February 2-3, 2027 | Ponte Vedra Beach, Florida

Using employer case studies that offer proven solutions along with insights from experts paving the way in their organizations, HBCE will guide you in identifying the right formula for positive outcomes at your organization.

Why You Should Attend:

- Hear from industry leaders who have faced the same issues you have, and learn what worked for them to reduce costs and improve employee engagement.
- Learn diabetes and obesity risk management strategies for health plans.
- Discover how to focus on employee engagement to drive health and wellness outcomes.
- Find out how plan sponsors can help break the cycle on the rising costs of specialty drugs.

» Sponsorship and Exhibitor Opportunities

Opportunities are available for many of the events listed.
See page 35 for more information.

www.ifebp.org/exhibitsponsor



Employee Benefits Courses and Certificates

Formerly known as Certificate Series

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.

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.

www.ifebp.org/benefitscourses



Scottsdale, Arizona | April 27-May 2, 2026



Orlando, Florida | September 28-October 3, 2026

401(k) Plans CP ME

This course provides a comprehensive overview of 401(k) plans, covering key topics including eligibility, plan design, testing and compliance. Over two days, explore hot-button issues such as ESG policies and fiduciary responsibilities, gaining insights to enhance plan effectiveness and support employee retirement goals. www.ifebp.org/401k

Upcoming: May 1-2, 2026 | Scottsdale, Arizona

Ancillary Benefit Plans CP ME PE

With changes in the economy and the way individuals value employment, ancillary benefits are a fantastic way to help balance the needs of a diverse workforce. Explore the value of offering a variety of ancillary benefits (beyond health plans) to increase employee engagement and tailor benefits to individual preferences. Examine how to structure, implement and communicate these benefits to raise awareness and enhance the total compensation package. www.ifebp.org/ancillary

Upcoming: September 28-29, 2026 | Orlando, Florida

Basic Compensation Concepts CP PE

Address the challenges of compensation planning in today's economic climate, offering best practices in compensation analysis, planning and management. Over two days, network with peers and experts, gaining actionable insights and strategies to improve your compensation programs as well as attract and retain top talent. www.ifebp.org/basiccomp

Upcoming: May 1-2, 2026 | Scottsdale, Arizona

Basics of Employee Benefits Administration CP ME PE

This course provides a thorough exploration of the fundamentals of employee benefits administration, essential for navigating today's complex and evolving landscape. Gain foundational knowledge and practical strategies from expert instructors to enhance your organization's benefit plans and achieve greater success. www.ifebp.org/benefitsadmin

Upcoming: April 27-28, 2026 | Scottsdale, Arizona
September 30-October 1, 2026 | Orlando, Florida

Employee Benefits Courses and Certificates

Formerly known as Certificate Series

IN-PERSON COURSES

Canadian Benefits Plan Administration

CP

G

New Course!

Receive 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

Communicating Employee Benefits

CP

ME

PE

G

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 their communication approaches, ensuring your plans are more engaging and impactful for participants. www.ifebp.org/communicating

Upcoming: May 1-2, 2026 | Scottsdale, Arizona
October 2-3, 2026 | Orlando, Florida

Funding and Finance of Health Benefits

CP

ME

PE

Discuss and compare the evolving methods for funding employee health benefits, focusing on selecting strategies that best fit organizational and employee needs, mitigating risk and striking a balance between self-funding and fully insured strategies. Explore the best practices and gain real-world insights for effective approaches to managing health care costs for successful outcomes. www.ifebp.org/funding

Upcoming: April 29-30, 2026 | Scottsdale, Arizona
September 28-29, 2026 | Orlando, Florida

Health Benefit Plan Basics

CP

ME

PE

Examine the foundational framework for evaluating and enhancing employee compensation and health plan designs, critical in today's competitive and postpandemic environment. Gain insights into legislative, regulatory and marketplace challenges, equipping you to navigate and improve health and welfare plan administration. www.ifebp.org/healthbenefitbasics

Upcoming: April 27-28, 2026 | Scottsdale, Arizona
October 2-3, 2026 | Orlando, Florida

Health Care Cost Management

CP

ME

PE

Rising health care costs, new technologies and changes in participant health have created unprecedented coverage challenges. Examine health care cost trends, containment strategies and evolving complexities. Network with your peers in the course and exchange actionable ideas for managing health care plans effectively. www.ifebp.org/healthcarecostmanage

Upcoming: May 1-2, 2026 | Scottsdale, Arizona
September 30-October 1, 2026 | Orlando, Florida

Global Benefits Strategy

CP

G

New Course!

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: April 27-28, 2026 | Scottsdale, Arizona
September 28-29, 2026 | Orlando, Florida

Global Benefits: Regional Compliance and Trends

CP

G

New Course!

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

Upcoming: April 29-30, 2026 | Scottsdale, Arizona
September 30-October 1, 2026 | Orlando, Florida

Employee Benefits Courses and Certificates

Formerly known as Certificate Series

IN-PERSON COURSES

Introduction to Public Sector Benefits Administration

Explore the unique challenges of managing employee benefits in the public sector, covering key topics such as government financing, legal and regulatory environments, and technology. Gain a deeper understanding of public plans through expert-led discussions and a case study, equipping yourself with actionable strategies to improve your organization's benefits structure. www.ifebp.org/introtoPE

Upcoming: September 30-October 1, 2026 | Orlando, Florida
October 24-25, 2026 | New Orleans, Louisiana

Investment Basics

Examine practical investment framework to help participants of all experience levels navigate the rapidly evolving investing landscape and avoid costly mistakes. Over two days, learn and network with peers and experts, gaining actionable insights and best practices to improve their investment strategies and outcomes. www.ifebp.org/investmentbasics

Upcoming: April 27-28, 2026 | Scottsdale, Arizona
September 28-29, 2026 | Orlando, Florida

Multiemployer Plan Administration

Gather with your peers for this two-day course to learn and network while gaining insights and understanding on how to run your plans. Take a deep dive into the fundamentals of multiemployer plans with instructors who are experts in the field. Walk away with a more solid understanding of the basics as well as strategies to use at your fund for managing member benefits. www.ifebp.org/MEPlanAdmin

Upcoming: September 30-October 1, 2026 | Orlando, Florida

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 27-28, 2026 | Scottsdale, Arizona

Public Sector 401, 403 and 457 Plans

Explore the unique challenges of managing public sector employee benefits, focusing on fiduciary responsibilities, compliance and fund performance. Both new and experienced professionals will gain valuable insights, strategies and networking opportunities to enhance your plans and drive organizational success. www.ifebp.org/PEPlans

Upcoming: October 2-3, 2026 | Orlando, Florida

Retirement Plan Basics

Dive into a comprehensive overview of defined benefit and contribution retirement plans, emphasizing fiduciary duties and emerging regulatory challenges. Connect and network with peers and experts to gain actionable insights for minimizing risks and enhancing plan value for your organization. www.ifebp.org/retirementbasics

Upcoming: April 29-30, 2026 | Scottsdale, Arizona
September 28-29, 2026 | Orlando, Florida

Total Rewards and Workforce Strategies

Dive deep into total rewards and workforce strategies during this two-day course, focusing on current and future trends to optimize employee benefit plans. Network with peers and experts, gaining insights and actionable strategies to balance both employee priorities and business objectives in total rewards. www.ifebp.org/totalrewards

Upcoming: April 29-30, 2026 | Scottsdale, Arizona

Employee Benefits Courses and Certificates

Formerly known as Certificate Series

IN-PERSON CERTIFICATES

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

www.ifebp.org/benefitscourses

Certificate in Benefit Plan Administration

CP PE

The complexities of managing and administering employee benefit plans in today's environment require knowledge and skills in a variety of areas. This course provides a survey of the core operational and strategic areas, including human resources strategies, risk management, communication, technology, funding/finance and vendor management, and it helps you adapt your total rewards strategies to your organization's needs.

Required Courses:

- Basics of Employee Benefits Administration
- Communicating Employee Benefits

Elective Courses—Choose One:

- Funding and Finance of Health Benefits
- Total Rewards and Workforce Strategies

Certificate in Benefits and Compensation

CP ME PE

Attracting and retaining a productive workforce requires balancing the three key components of a total rewards strategy: compensation, health plans and retirement plans. This certificate provides a survey of these three components as well as a chance to develop your baseline technical skills in compensation concepts.

Required Courses:

- Basic Compensation Concepts
- Health Benefit Plan Basics
- Retirement Plan Basics

Certificate in Canadian Benefits Management

CP G

Gain a comprehensive understanding Canadian employee benefits as well as best practices for total rewards and benefits management globally.

Required Courses:

- 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.)

SECTOR KEY

CP

Corporate Plan Sponsors

ME

Multiemployer Plans

PE

Public Employee Plans

G

Global

Employee Benefits Courses and Certificates

Formerly known as Certificate Series

IN-PERSON CERTIFICATES

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.

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

Certificate in Health and Welfare Plans

As the legislative and regulatory landscape in health care continues to evolve, it is important to stay informed about the latest changes and trends. This certificate provides plan management strategies and plan design options, including fundamentals of managed care, consumer-driven health care and value-based strategies, as well as a survey of ancillary benefit plans.

Required Courses:

- Health Benefit Plan Basics
- Health Care Cost Management

Elective Courses—Choose One:

- Ancillary Benefit Plans
- Funding and Finance of Health Benefits

Certificate in Multiemployer Plan Administration

Explore the legal and regulatory frameworks that govern multiemployer plans. Participants will learn the essentials of fiduciary responsibilities, plan funding, contributions and reporting obligations. Elective courses delve deeper into investments, health and welfare plans, defined benefit pension plans and 401(k) retirement plans.

Required Courses:

- Multiemployer Plan Administration

Elective Courses—Choose Two:

- 401(k) Plans
- Health Benefit Plan Basics
- Health Care Cost Management
- Investment Basics
- Retirement Plan Basics

Certificate in Public Sector Benefits Administration

The public sector has unique characteristics that impact how employee benefits are managed. Financing, politics, and the legal and regulatory environment pose challenges and opportunities that require professionals to understand how public plans operate. Take one core class that provides a survey of public sector benefits administration and two elective courses. Select your elective courses to tailor your learning to your specific needs.

Required Courses:

- Introduction to Public Sector Benefits Administration

Elective Courses—Choose Two:

- Health Benefit Plan Basics
- Health Care Cost Management
- Investment Basics
- Public Sector 401, 403 and 457 Plans
- Retirement Plan Basics

Employee Benefits Courses and Certificates

Formerly known as Certificate Series

IN-PERSON CERTIFICATES

Certificate in Retirement Plans



The challenges of funding for retirement have brought a host of changes in the laws, regulations and trends that impact retirement plans. This certificate provides a survey of defined benefit and defined contribution retirement plans, Social Security, investment principles, and the legal and regulatory environment—from a historical perspective through today.

Required Courses:

- Investment Basics
- Retirement Plan Basics

Elective Courses—Choose One:

- 401(k) Plans
- Public Sector 401, 403 and 457 Plans

Certificate in Strategic Benefits Management



The complexities of managing total rewards programs in today's changing landscape require a broad, strategic perspective as well as the ability to align programs with overall business needs and human resources goals. This certificate will help you define your objectives for attracting, motivating, supporting and retaining talent in your organization. Receive tools to measure the effectiveness of your programs—in both return on investment and the impact on your company culture.

Required Courses:

- Health Care Cost Management
- Organizational Strategies for Health and Financial Wellness
- Total Rewards and Workforce Strategies

“My training this week unlocked the foundational 'why' behind many of the practices I've always known. It connected the dots, it offered valuable insights with those 'aha' moments, and I am eager to apply those new insights. The open dialogue between my peers greatly enriched my learning experience.

Andrea Thompson

First-time EBCC attendee and
Human Resources Benefit Manager
UMWA Health and Retirement Funds

SECTOR KEY



Corporate Plan Sponsors



Multiemployer Plans



Public Employee Plans



Global

MULTIEMPLOYER TRUSTEE AND FIDUCIARY EDUCATION

IN-PERSON COURSES



San Diego, California
June 13-17, 2026



New Orleans, Louisiana
October 23-25, 2026



Orlando, Florida
February 13-17, 2027

New Trustees Institute—

LEVEL I: CORE CONCEPTS

If you're a new trustee serving on multiemployer health, retirement or other ERISA plans, this is the event for you. Learn all about your role and your responsibilities as a fiduciary. You'll gain a solid understanding of best practices, legal requirements and current issues that the benefits industry is facing, plus you'll have time to network with other new trustees facing similar challenges you are. www.ifebp.org/newtrustees

Upcoming: June 15-17, 2026 | San Diego, California
October 23-25, 2026 | New Orleans, Louisiana
February 15-17, 2027 | Orlando, Florida

Trustees Institute—

LEVEL II: CONCEPTS IN PRACTICE

This course is for experienced multiemployer trustees who have completed the Level I course. The curriculum will take a deeper dive into the benefits industry and your oversight role with a focus on practical application. This highly interactive learning experience will give you the framework and tools you need to address the many challenges you face as a trustee. www.ifebp.org/trusteeslevel2

Upcoming: June 13-14, 2026 | San Diego, California
October 24-25, 2026 | New Orleans, Louisiana
February 13-14, 2027 | Orlando, Florida



The Trustees Masters Program (TMP) is for advanced-level trustees who want to gain a deeper insight into their role as well as interact with peers. You'll receive special recognition for your knowledge and participation with a TMP certificate and pin. www.ifebp.org/tmp

Upcoming: October 24-25, 2026 | New Orleans, Louisiana

PUBLIC TRUSTEE AND FIDUCIARY EDUCATION

IN-PERSON COURSES



San Diego, California
June 15-16, 2026



New Orleans, Louisiana
October 24-25, 2026



Orlando, Florida
February 15-16, 2027

Public Plan Trustees Institute—LEVEL I PE

Public sector health and retirement plan trustees and other fiduciaries can find education targeted to their specific needs at the Public Plan Trustees Institute, a new program replacing the Certificate of Achievement in Public Plan Policy (CAPP[®]) program. This streamlined educational offering combines health and pension tracks into a single track to emphasize essential fiduciary duties and is a cost-effective way to obtain thorough, relevant information. www.ifebp.org/public

Upcoming: **June 15-16, 2026 | San Diego, California**
October 24-25, 2026 | New Orleans, Louisiana
February 15-16, 2027 | Orlando, Florida

Public Plan Trustees Institute—LEVEL II PE

Public sector health and retirement plan trustees and other fiduciaries can continue their education with Level II of the Public Plan Trustees Institute. Level II will cover public plan governance and emerging issues, investing public plan assets, trustee board strategies, and plan administration communication and concepts. www.ifebp.org/public

Upcoming: **June 15-16, 2026 | San Diego, California**
October 24-25, 2026 | New Orleans, Louisiana
February 15-16, 2027 | Orlando, Florida



Portfolio Concepts and Management



Taught by esteemed Wharton School faculty, this program is designed to equip you with the knowledge and tools to navigate the complexities of investments and portfolio management. The course will teach you the core principles of portfolio theory, investment performance and measurement. Take away the practical tools and experiences you need to make sound investment management decisions.

www.ifebp.org/portfolio

Upcoming: **May 11-14, 2026 | Philadelphia, Pennsylvania**



Understanding Negotiated Employee Benefits



Negotiating employee benefits is an important function that has a significant impact on all stakeholders. This course will cover both the employee benefits industry and the collective bargaining process so you can engage strategically as you bargain in good faith, yielding productive outcomes for your stakeholders. www.ifebp.org/NegotiatedEmployeeBenefits

Upcoming: **July 14-15, 2026 | Brookfield (Milwaukee), Wisconsin**



Designing Curriculum to Close the Skills Gap



This hands-on workshop will help seasoned and new professionals improve the development, delivery and evaluation of learning by providing a proven process to incorporate into their apprenticeship programs. Participants will learn to apply a systematic approach—based on the Developing a Curriculum (DACUM) model—to deliver a more impactful apprenticeship program. www.ifebp.org/skills-gap

Upcoming: **July 21-22, 2026 | Brookfield (Milwaukee), Wisconsin**



Collection Procedures Institute



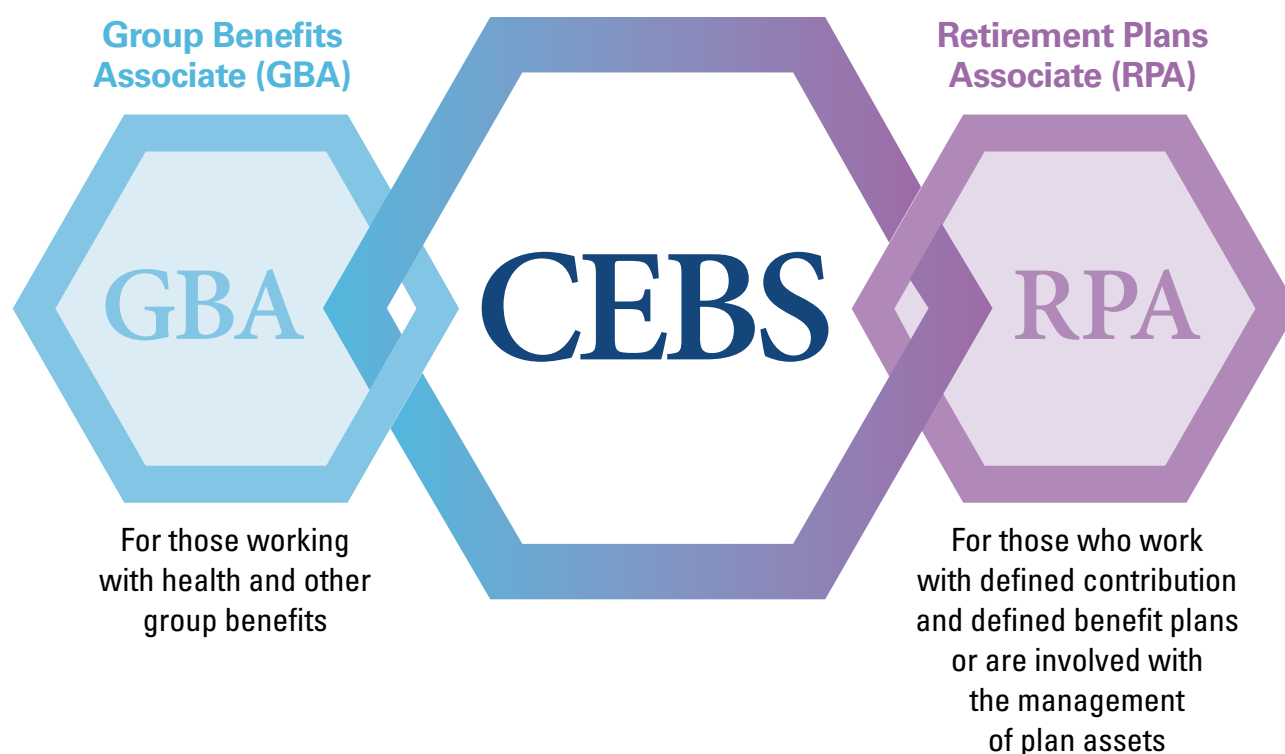
The Collection Procedures Institute will provide you with the information you need to fulfill your fiduciary responsibility to collect benefit payments. This course will present best practices, trends, and legal and legislative updates from expert instructors. Benchmark your policies and procedures and network with those who face similar challenges. www.ifebp.org/collections

Upcoming: **September 28-29, 2026 | Orlando, Florida**

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 the Wharton School of the University of Pennsylvania 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 textbook, Study Guide, Online Study Group and exam.

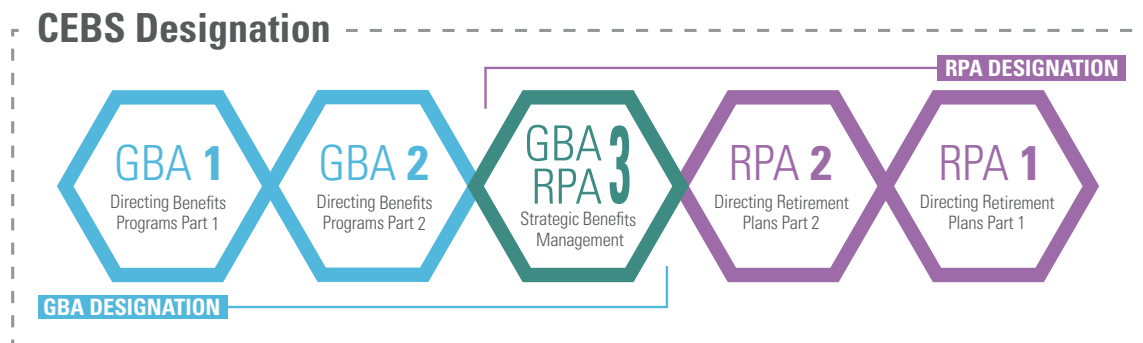
A JOINT PROGRAM OF



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
Employee Benefits: The Environment	Employee Benefits: The Changing Dynamics of the U.S. Health Care System	ERISA Regulatory Framework	Retirement Plan Investing	Private Retirement Plans: Background and Context
Managing Employee Benefits Risks	Rating and Premium Setting	Benefits Industry	Balancing Risk and Return	Defined Contribution and Defined Benefit Structures
Group Health Plan Structures	Controlling Risk Factors	Plan Documentation Requirements	Portfolio Theory	Defined Benefit Approaches and Executive Plan Arrangements
Consumer-Directed Health Plans	Designing Cost-Effective Health Provider Networks	Cybersecurity and Privacy Concerns	Portfolio Selection and Asset Allocation	Overview of Defined Contribution Plan Structures and Stock Compensation Plans
Dental, Vision and Hearing Care Benefits	Participant Response to Health Plan Pricing	Overseeing and Managing Plan Audits	Investment Managers and Plan Intermediaries	Profit-Sharing Pension and Money Purchase Plans
Prescription Drug Plans	Initiatives in Health Care Quality Improvement	Issues in Vendor Management—Retirement	Active and Passive Investment Strategies	Foundations of 401(k) Plans
Behavioral Health Care Benefits	Small-Group and the Individual Insurance Market	Analytics and Vendor Management—Health	Insights From Behavioral Finance	Defined Contribution Practice Issues
Workplace Wellness Programs	Self-Funding by Small Employers	Impact of Financial Product Innovation on Retirement Plans	Hybrid Retirement Plan Approaches	Special Purpose Plans: 403(b)s, 457s and ESOPs
Section 125 Plans	Integrated Patient Care	ERISA in Practice—Key Issues	Plan Sponsor Administrative Responsibilities	Small Employer Retirement Plan Alternatives
Health Care Regulation	Disability Income Programs	Social Insurance	Participant Services	Individual Retirement Accounts (IRAs)
	Long-Term Care Insurance	Health Care Coverage in Retirement	Fiduciary Oversight and Plan Governance	
	Life Insurance Concepts and Policy Options	Global Employee Benefits		

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 60 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 can 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 more than 40 e-learning courses that can be housed on your internal LMS for easy tracking and grading.



WEBCASTS

Offering a series of webcasts is a cost-effective and convenient way to train staff wherever they are located. Direct interaction with subject matter experts allows for your specific issues to be addressed.

Our Most Popular Options for On-Site Training Include:

Multiemployer Education

- New Trustees Institute—Level I: Core Concepts
- Certificate in Health and Welfare Plans
- Certificate in Retirement Plans

Public Employer Education

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

Corporate/Single Employer Education

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

VIRTUAL CONFERENCES/COURSES

www.ifebp.org/onlineworkshops

Well-Being at Work

June 3-4, 2026 | Virtual Conference



This live, virtual program will cover a series of topics that highlight specific experiences that shape well-being. Day one will focus on women's well-being, and day two will focus on men's well-being.

Accounting and Auditing Institute for Employee Benefit Plans

June 15-17, 2026 | Virtual Conference



Do you audit employee benefit plans? Join us for the virtual offering of this conference to make sure you're staying up to date on the latest in reporting and disclosure requirements. Ask questions and learn from the experts so you can better understand the current issues impacting multiemployer pension and health and welfare plans.

Certificate in Global Benefits Fundamentals

July 14-15, 2026 and 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 multinational 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, an overview of health care options and a look at the legal landscape.

Mental Health in the Workplace

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.

72nd Annual Employee Benefits Conference

October 25-28, 2026 | Virtual Conference



Can't join us in New Orleans? Participate virtually and get the same great educational content from experts who truly understand your day-to-day challenges. Expand your learning and rewrite what it means to be an exceptional trustee or administrator. Visit the vendor showcase to receive special offers, download resources, make appointments and more. Earn a certificate of attendance by watching at least 11 sessions (live or on demand).

Institute for Apprenticeship, Training and Education Programs

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.



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!

www.ifebp.org/webcasts

ONLINE CERTIFICATES

www.ifebp.org/onlinecertificates

FUNDAMENTALS IN HEALTH BENEFITS

Get up to speed on how and why an employer may sponsor a health plan for its employees and their beneficiaries. Required courses will outline the various ways to structure a group health plan as well as the many laws and regulations that impact them. Elective courses* explore plan funding and ancillary health benefits that plan sponsors may offer.

Required Courses

- Introduction to Group Health Plans
- Overview of Prescription Drugs

Elective Courses*

- Health Savings Accounts (HSAs)
- Self-Funded Health Plan Basics
- Workforce Wellness



FUNDAMENTALS IN RETIREMENT PLANS

Learn everything you need to know about designing and administering a compliant retirement plan. Courses will outline the different plan structures available, legal and regulatory requirements, contribution and distribution rules, as well as the unique responsibilities of various decision makers.

Required Courses

- Overview of Retirement Plans
- Retirement Plan Investments and Vendor Management

Elective Courses*

- 401(k) Plans
- Defined Benefit Plans
- Defined Contribution Plans



CERTIFICATE IN ABSENCE MANAGEMENT

For employers in any industry, the direct and indirect costs associated with employee absences can be staggering. Analyze the reasons employees miss work as well as how absenteeism and presenteeism affect organizational productivity. Then, learn how to design a comprehensive leave program for employees while maintaining compliance with the Family and Medical Leave Act (FMLA) and the Americans with Disabilities Act (ADA).

Required Courses

- Americans with Disabilities Act (ADA)
- Family and Medical Leave Act (FMLA)
- Leave Program Design and Administration
- Managing Absence and Productivity Issues
- Overview of Disability Plans

**Take one elective course to earn the certificate, but get access to all three and complete the remaining two courses if/when you want.*



ONLINE CERTIFICATES

www.ifebp.org/onlinecertificates

CERTIFICATE IN ERISA COMPLIANCE

For private employee health and welfare and retirement benefit plans, compliance with the Employee Retirement Income Security Act of 1974 (ERISA) is mandatory. Required courses will outline the general requirements of ERISA that all plans must follow as well as identify who is a fiduciary to the plan and what this role entails. Elective courses* drill down into how ERISA impacts group health plans, retirement plans, plan investing and vendor management.

Required Courses

- ERISA
- Fiduciary Responsibility for ERISA Plans

Elective Courses*

- Introduction to Group Health Plans
- Overview of Retirement Plans
- Retirement Plan Investments and Vendor Management



CERTIFICATE IN HEALTH PLAN NAVIGATION

Health care benefits are complex, and your plan participants look to you for the answers. If you are on the front line of health care enrollment at your organization, the Certificate in Health Plan Navigation is the education you need to better understand the health care system and support your plan participants in making the best health care choices.

Required Courses

- Health Care Cost and Quality
- Health Care Delivery Models
- Health Insurance Basics
- Health Literacy
- Overview of ACA
- Overview of Disability Plans
- Overview of Exchanges
- Overview of Prescription Drugs



**Take one elective course to earn the certificate, but get access to all three and complete the remaining two courses if/when you want.*

ONLINE CERTIFICATES

www.ifebp.org/onlinecertificates

CERTIFICATE IN MULTIEMPLOYER PLAN AUDITING

Multiemployer plans are a unique structure of benefit plans that can require special considerations for accounting and auditing issues. First, familiarize yourself with what multiemployer plans are, how they are meant to function and where legal problems can occur. Then, learn about accounting and auditing guidelines for multiemployer plans, including tax forms, financial processes, required financial statements and common multiemployer reporting issues.

Required Courses

- Multiemployer Plan Accounting and Auditing
- Multiemployer Plan Structure and Administration



CERTIFICATE IN SELF-FUNDING GROUP HEALTH PLANS

Employers that sponsor a group health plan for their employees may choose to self-fund the plan instead of purchasing health insurance. This means that the plan sponsor retains the financial risk and pays for all health claims out of specifically reserved funds or general business assets. The decision to self-fund is complex and involves strategic decision making regarding plan design, cost-containment strategies, plan administration and whether to purchase stop-loss insurance. Review these decision points in detail.

Required Courses

- Self-Funded Health Plan Basics
- Self-Funded Health Plans: Cost-Containment Strategies
- Self-Funded Health Plans: Plan Administration
- Self-Funded Health Plans: Understanding Stop-Loss Insurance



E-learning courses qualify for CEBS Compliance credit.

The International Foundation has preapproval from the Human Resource Certification Institute (HRCI) for PHR/SPHR/GPHR and the Society for Human Resource Management (SHRM) for SHRM-CP/SHRM-SCP recertification for most e-learning courses. In addition, courses are approved in many states for insurance licensure continuing education credit.

To see how you could earn credit, go to www.ifebp.org/elearningce.

E-LEARNING COURSES

www.ifebp.org/elearning

International Foundation e-learning courses deliver top-quality instruction in a convenient, self-paced format. Developed by industry experts, each online course provides a one-of-a-kind learning experience—allowing you to learn whenever and wherever fits your schedule.

E-learning courses can be taken individually or as part of an online certificate so you can get the exact training you need.

COBRA | Four-Credit Course

The Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) requires that most employer-sponsored group health plans must provide employees and their families the opportunity for a temporary extension of plan coverage in certain instances when that coverage would otherwise end. This course will explain the technicalities of COBRA, including who is entitled to COBRA, for how long and at what cost as well as how it must be administered.

Flexible Spending Accounts (FSAs) | Four-Credit Course

A flexible spending account (FSA) is an individual account that can reimburse an employee for qualified medical expenses and work-related child-care expenses. This course reviews the different types of FSAs, how employers can design these plans, compliance requirements, tax advantages, reimbursement rules, claims substantiation and other administrative considerations. Conclude this course by comparing FSAs to other employer-sponsored health accounts.

Health Care Cost and Quality | One-Credit Course

Plan participants can manage their health care expenses by using their health plan strategically, maintaining good health and seeking high-quality care. This course will review concepts such as balance billing for out-of-network care, claims and appeals, provider price and quality transparency, and programs to improve health and lower costs.

Health Care Delivery Models | One-Credit Course

Health care delivery is affected by the scope of the plan's provider network as well as the ways in which the participants can interact with the network. Health care delivery models are regularly evolving based on industry trends, economic and social pressures, and legislative mandates. This course will review how health care plans utilize various models for delivering care to participants.

Health Insurance Basics | One-Credit Course

Health insurance helps to minimize the financial impact of a person's medical costs by transferring some of the risk to the insurance provider. This course will review these cost-related concepts as well as introduce additional spending and savings options that can be used to pay for health care and supplies. The course will also provide information about federal laws that protect participants of group health plans.

Health Literacy | One-Credit Course

People who participate in group health plans will have different levels of health literacy, and the majority will have lower health literacy due to a variety of factors. This course defines health literacy and its various subsets and addresses how to evaluate a participant's health literacy aptitude. The course also provides a comprehensive overview of how to assist participants with low health literacy in any setting.

E-LEARNING COURSES

www.ifebp.org/elearning

Health Reimbursement Arrangements (HRAs) | Two-Credit Course

Employers interested in allowing employees to direct some of their own health care spending while still maintaining flexibility regarding plan design may consider offering an HRA. This course reviews HRA funding requirements, tax advantages, distribution options for qualifying medical expenses, claims substantiation and other administrative considerations. Conclude this course by comparing HRAs to other employer-sponsored health accounts.

Health Savings Accounts (HSAs) | Three-Credit Course

HSAs are designed to pay for day-to-day qualified medical expenses on a tax-favored basis before health coverage provided through a high-deductible health plan (HDHP) begins. Learn about who can own and contribute to an HSA as well as contribution limits, distribution requirements and administration considerations. Conclude this course by comparing HSAs to other employer-sponsored health accounts.

HIPAA Privacy | One-Credit Course

HIPAA violations are costly. How do you stay informed and compliant? This course provides comprehensive training on the latest HIPAA regulations for plan sponsors and business associates. Learn who and what are covered by the HIPAA Privacy Rule, how to properly disclose protected health information (PHI) and when the minimum necessary standards apply.

HIPAA Security | One-Credit Course

Covered entities and business associates must comply with the HIPAA Security Rule. Learn administrative, physical and technical best-practice safeguards to have in place and how to document your compliance.

Introduction to Group Health Plans | Four-Credit Course

Group health benefits play a key role in attracting and retaining your employees. Having trained staff who can effectively answer group health plan questions is essential. This course identifies the different plan funding options, outlines the evolution of managed care, reviews cost-containment strategies for group health plans, and addresses how plans must comply with federal and state laws.

Overview of ACA | One-Credit Course

This course offers an introductory look at the main components of ACA as well as how the law has changed over time. Learn about mandated benefits and plan design features that affect individuals as well as employer-sponsored group health plans, and discover how individuals and small employers can purchase health insurance through the ACA Marketplace and the Small Business Health Options Program (SHOP).

Overview of Disability Plans | One-Credit Course

Learn more about various types of private and government-sponsored disability insurance plans as well as how to guide participants with disabilities through the process of choosing or utilizing coverage.

Overview of Exchanges | One-Credit Course

Everything you need to know about the ACA-created online marketplace, also known as a *public exchange* in some states, is covered in this course. It will also define private exchanges and differentiate the types of health coverage currently available through each.

E-LEARNING COURSES

www.ifebp.org/elearning

Overview of Prescription Drugs | One-Credit Course

For most people, taking medication is a part of daily life, and prescription drug coverage provides an opportunity to obtain these drugs more affordably. Learn how people can gain access to prescription drug coverage, and define different types of drugs and how they may vary in price. This course will also review how various plan features can affect cost for plan participants and how participants can purchase necessary drugs using a plan.

Retiree Health Care | Two-Credit Course

This course discusses the options for retiree health care. It provides information about Medicare benefits, eligibility and enrollment options. This course also addresses how employer-sponsored health care plans work with current employees over the age of 65 and provides clarification of long-term care.

Self-Funded Health Plan Basics | One-Credit Course

Employers providing group health plans for their employees often choose to self-fund medical benefits instead of purchasing insurance. It is critical for plan sponsors to understand how these two approaches differ, how they are the same, and the pros and cons of each. This course provides a foundation for decision making, design and administration.

Self-Funded Health Plans: Cost-Containment Strategies | Two-Credit Course

Gaining more control over health care costs is a priority for every health plan sponsor. Sponsors of self-funded plans often have more flexibility than sponsors of insured plans to customize and implement their preferred design and cost-management strategies. This course explains how data analytics and predictive modeling can point the way toward effective cost-containment strategies. It describes various plan designs and methods self-funded plan sponsors can use to deliver cost-effective health care benefits while achieving strategic goals.

Self-Funded Health Plans: Plan Administration | Three-Credit Course

Self-funded group health plan sponsors must give careful consideration to plan administration. This includes, but is not limited to, enrolling plan participants, collecting contributions, ensuring that funds are appropriately reserved and invested, processing claims, recordkeeping, communicating with plan participants and maintaining compliance with federal laws. This course provides a deep dive into the intricacies of these tasks, identifies the various types of service providers to whom the plan can outsource these duties, and describes how a plan sponsor can prudently select and monitor a vendor.

Self-Funded Health Plans: Understanding Stop-Loss Insurance | One-Credit Course

Self-funded health plan sponsors often purchase stop-loss insurance for financial risk management. Stop-loss insurance protects plan sponsors from unexpected, costly medical claims that could jeopardize their core business. This course explains the types of stop-loss insurance available and what to know before purchasing and negotiating a policy. The course also describes captive arrangements that can be used along with stop-loss insurance for risk management.

Workforce Wellness | Three-Credit Course

A workforce wellness initiative refers to the systematic efforts of an organization to enhance the wellness of its members through education, behavioral change and cultural support. Many employers support employee wellness because improved quality of life positively affects the overall productivity, health and stability of the workforce. This course describes how to design and administer an effective wellness initiative.

E-LEARNING COURSES

www.ifebp.org/elearning

401(k) Plans | Four-Credit Course

The 401(k) plan has emerged as the primary retirement savings plan for many employees because of the tax advantages it provides. This course looks at many considerations for structuring and administering a compliant 401(k) plan, including employer and employee contributions, nondiscrimination testing, safe harbor protections, automatic enrollment and distributions.

Defined Benefit Plans | Two-Credit Course

Learn about the defined benefit plan options available to plan sponsors, including the different pay- and service-related benefit formulas, plan funding responsibilities, investment decisions and risks, distribution methods and plan termination options.

Defined Contribution Plans | One-Credit Course

A defined contribution plan offers flexibility to the plan sponsor and places all investment risk on the participant. Study how profit-sharing plans, employee stock ownership plans (ESOPs), money purchase pension plans, employer-sponsored IRAs, simplified employee pension (SEP) plans and Savings Incentive Match Plans for Employees (SIMPLE plans) provide different retirement savings options to employees.

Overview of Retirement Plans | Three-Credit Course

Plan sponsors have many options when designing a retirement plan. Learn about the history and objectives of retirement plans, income sources in retirement, the role of plan sponsors, different plan structures available and how to educate employees. This course will also review Internal Revenue Code (IRC) and ERISA requirements that retirement plans must meet to qualify for tax advantages.

Retirement Plan Investments and Vendor Management | Four-Credit Course

Meet all the key players involved in designing, administering and growing a retirement plan. Review the unique responsibilities of plan sponsors, trustees, fiduciaries, retirement plan committees, investment consultants and managers, actuaries, recordkeepers and third-party administrators (TPAs), and learn how to manage relationships with each of these groups.

Understanding Social Security | Three-Credit Course

This course is designed to help both employers and individual workers understand eligibility requirements and funding processes in anticipation of applying for Social Security or Social Security Disability Insurance (SSDI).



Ready or Not: Your Retirement Planning Guide

Ready or Not is the comprehensive and essential guide to life after work. The latest edition contains specific, detailed retirement information in clear, concise language. This guide will help you and your employees make the most of what can be the best years of your life.

www.ifebp.org/ReadyOrNot



E-LEARNING COURSES

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Americans with Disabilities Act (ADA) | Three-Credit Course

ADA provides a broad series of protections against discrimination for Americans with disabilities. This course goes into depth on Title I of ADA, which specifically provides protection from employment discrimination to qualified applicants and employees with disabilities.

ERISA | Four-Credit Course

Get the information you need to understand the requirements of the Employee Retirement Income Security Act of 1974 (ERISA), including types of plans covered, penalties, vesting requirements, fiduciary responsibilities, and reporting and disclosure requirements.

Family and Medical Leave Act (FMLA) | Four-Credit Course

The Family and Medical Leave Act (FMLA) is a federal law that serves to balance the demands of the workplace with the needs of families by protecting employees and employers when reasonable, approved military- and non-military-related leave is needed. This course covers how to recognize coverage and eligibility requirements of employees, identify the responsibilities of employers, deal with employee discipline and terminations in accordance with FMLA, avoid common administration mistakes, implement best practices and be aware of interactions with other laws.

Fiduciary Responsibility for ERISA Plans | Two-Credit Course

This course is designed to help fiduciaries understand their responsibilities and avoid penalties and personal liability. Reviewed topics include implications of co-fiduciary liability, delegation of duties, and the importance of establishing and following policies and procedures.

Leave Program Design and Administration | Four-Credit Course

Leave programs provide employees the opportunity to take time off from work as needed to refresh, vacation, resolve personal issues or address medical problems without the risk of losing their jobs. In some cases, leave is fully or partially paid, and other employee benefits continue uninterrupted. This course will review the various types of short- and long-term leave programs that employers can provide as well as best practices for designing and administering these benefits while maintaining compliance with federal, state and jurisdictional laws.

Life and Accidental Death and Dismemberment (AD&D) Insurance | Two-Credit Course

The wide variety of life insurance products can make it difficult for employers to decide which types of coverage to offer employees. This course provides a solid understanding of life insurance options, business-oriented life policies, accidental death and dismemberment (AD&D) policies, and underwriting and eligibility requirements.

E-LEARNING COURSES

www.ifebp.org/elearning

Managing Absence and Productivity Issues | Two-Credit Course

Each year, employers collectively lose billions of dollars due to employee absence. This includes time away from the office for health-related and non-health-related issues and disability leave as well as presenteeism and other distractors that decrease employee productivity on the job. This course addresses absence management strategies and other tools for driving employee productivity.

Multiemployer Plan Accounting and Auditing | Three-Credit Course

Because of their specialized structures, multiemployer plans have numerous differences and nuances to handling finances. These plans may have special reporting requirements, financial processes, financial statements, and other accounting and auditing issues. This can create difficulties for any accountant who is required to work on a multiemployer plan but is not familiar with how they function. This course provides high-level information for dealing with the accounting and auditing of multiemployer plans as well as points to additional resources and areas of inquiry.

Multiemployer Plan Structure and Administration | Two-Credit Course

Because they must combine the sponsorship and leadership of multiple companies as well as labor union representation, multiemployer benefit plans require a unique structure and administration. For anyone working with a multiemployer plan, it is essential to understand how these plans function and how their responsibilities are divided. This course will look at the basics of multiemployer plans, the people who guide plan decisions, basic plan regulations and the types of fraud that can occur in multiemployer plans.

Train Your Team and Save

Take advantage of special discounted pricing when you train your team with Foundation e-learning courses. www.ifebp.org/teamtraining

Quantity Discount Pricing
(Price per Course Credits)

Number of Credits	Discount
26-99	10%
100-199	15%
200-499	20%
500-999	25%

Talk to a team training specialist at (888) 334-3327, option 3, or teamtraining@ifebp.org.

REACH OUR MEMBERS

www.ifebp.org/exhibitsponsor

Many of the programs listed throughout this catalog offer opportunities for sponsors or exhibitors to connect with attendees. Join us to network with decision makers so you can nurture your customer relationships in person; secure high-quality leads; and showcase your brand, products and services.



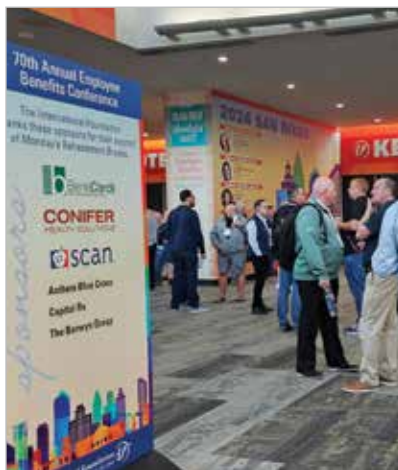
EXHIBIT

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

- Annual Employee Benefits Conference
- Annual Art & Science of Health Promotion Conference
- Annual Wellness Summit
- Health Benefits Conference & Expo (HBCE)
- Trustees and Administrators Institutes



**ADVERTISING,
EXHIBIT AND
SPONSORSHIP
OPPORTUNITIES:**
ifexpo@ifebp.org



SPONSOR

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

- Annual Employee Benefits Conference
- Annual Art & Science of Health Promotion Conference
- Annual ISCEBS Employee Benefits Symposium
- Annual Wellness Summit
- Fraud Prevention Institute for Employee Benefit Plans
- Health Benefits Conference & Expo (HBCE)
- Health Care Management Conference
- Institute for Apprenticeship, Training and Education Programs
- Investments Institute
- Trustees and Administrators Institutes



ADVERTISE

Promote your organization in our publications! Our niche audience consists of 30,000+ members. Print and digital advertising are available.

- *Today's Headlines* is an e-newsletter delivered each day to 19,000+ members.
- *Benefits Magazine* is distributed bimonthly to 25,000+ Foundation members in the U.S.
- *Jobs in Benefits* is a virtual hub where the best candidates and the best organizations can connect, infusing new talent and innovation into organizations across the industry.
- The Service Provider Directory is an online resource for members to find employee benefits, compensation and human resources-related products and services.
- Sponsored webcasts allow the sponsor to provide the content and speakers for their own webcast. Sponsors have access to recording and registration lists.

INTERNATIONAL FOUNDATION MEMBERSHIP

www.ifebp.org/membership

Over 31,000 members depend on the Foundation for answers they can trust, increased confidence in their work, and a helpful community of peers and industry experts. Members also receive exclusive discounts on virtual and in-person education.

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



STAY COMPLIANT

Legislative and Regulatory Updates

Find vetted, expertly curated legislative and regulatory updates impacting the industry at:

- www.ifebp.org/news/regulatoryupdates
- www.ifebp.org/resources/legislative

Today's Headlines

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



MAKE CONNECTIONS

Foundation Community

Chat directly with your peers and learn from others' conversations at www.ifebp.org/community.

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. Visit www.ifebp.org/jobsinbenefits to explore more.

Personalized Research Service

Work with a Foundation information specialist to get your complicated benefits questions answered.



The Personalized Research Service is the real jewel within the International Foundation. Especially for a smaller member organization, it is critical in value.

Errol Katcher
Strategy Focus



The member resources, magazine and discounted educational programs have been exactly what I was searching for. I will absolutely be renewing my International Foundation membership; it's been an invaluable addition to my professional toolkit!

Amy Tarbox
YHB | CPAs & Consultants



SAVE TIME

Benefits Knowledge Center

Locate over 13,000 resources, including articles, court cases, survey reports, InfoQuicks and sample documents, on a variety of employee benefit topics.

InfoQuick

Access resources from over 100 frequently asked questions about industry topics, saving hours of searching time.

Sample Documents

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

Benchmarking Survey Reports

Access difficult-to-find details and benchmarking topics to address the challenging benefits environment. Recent reports cover GLP-1 drug coverage, workplace wellness, paid leave, mental health and health care costs.



LEARN FROM THE EXPERTS

Webcasts

Gain just-in-time information on developing benefit issues through extensive live and on-demand webcasts that feature industry experts.

Benefits Magazine

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

Toolkits

Access vetted and curated Foundation resources on paramount topics including Presidential Administration and Employee Benefits, Compliance Calendars and Resources, Benefits Industry Basics, Workplace Mental Health and more.

CONTINUING EDUCATION

www.ifebp.org/ce

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

Attorneys

For seminars and conferences, continuing legal education (CLE) can be earned if the session is legal in content and substantial handouts are distributed at the session. The International Foundation seeks approval of seminars and conferences from state bar associations based on requests for CE credit on program registration forms. Credit for self-study courses is subject to individual state board regulations.

Certified Financial Planners

The International Foundation is a registered CE sponsor with the CFP® Board of Standards. CFP® designees are responsible for determining whether a program is appropriate and qualifies for CE credit. The International Foundation voluntarily submits its Annual Employee Benefits Conference for approval and distributes at that program a list of sessions preapproved for credit. For all other programs, the CFP® must determine qualification of the course to the CFP®-accepted subject topics.

Certified Public Accountants

The International Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of group-live continuing professional education (CPE) on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Whether credit can be earned for self-study courses would be subject to the individual state boards of accountancy regulations.

Enrolled Actuaries

The International Foundation is an accepted sponsor under Section 20, CFR Part 901(g)(2)(iii) of the final Rules and Regulations governing those enrolled to perform actuarial services under ERISA. The final decision as to applicable credit rests with the Joint Board for the Enrollment of Actuaries.

Credit Hours

Credit hours and filing procedures vary by discipline and from state to state. Please visit our website at www.ifebp.org/ce or contact the International Foundation Continuing Education Department for more information at (262) 786-6710, option 2, or continuinged@ifebp.org.

Insurance Producers

The International Foundation seeks approval of seminars and conferences from state insurance departments based on requests for CE credit on program registration forms. Approval of all programs is not automatically sought in all states. All state insurance departments require preapproval of programs for insurance CE credit. Most of the states require receipt of an approval request at least 90 days in advance of the program. It is important that insurance producers requesting CE credit register far enough in advance of the program that the requirement for advance approval can be met. The International Foundation self-study courses, including e-learning and CEBS courses, have been preapproved by multiple state insurance departments. Contact the Continuing Education Department for specific self-study approval information.

Human Resources Professionals

HRCI

International Foundation e-learning courses and some educational conferences are recognized for recertification credit hours toward PHR®, SPHR®, GPHR®, aPHR®, PHRca®, PHRi™ and SPHRi™ through the HR Certification Institute (HRCI).

SHRM

International Foundation e-learning courses and some educational conferences are recognized for professional development credits (PDCs) for the SHRM-CPSM or SHRM-SCPSM designations through the Society of Human Resource Management (SHRM).

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 the U.S. and Canada, 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.



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

Phone: (262) 786-6710, 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 in the International Foundation:

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 at the Committee or Board level. Any member of the International Foundation can be nominated. Submit your information or nominate a colleague. We'd love to hear from you.





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For many years, I have
relied on the Foundation
to provide accurate, unbiased
information that I could
put full faith in.

Steve Allen
Delaware Valley Consulting
Group, Inc.



The Foundation is a
wonderful resource and
extremely beneficial to everyday
management of group benefits.

Marcy Scott
Allied Pilots Association



I believe my access to
continuing education has
made me become more of an
asset to the trusts I serve.

Darryl Tseu
All Alaska Longshore
Trusts