

2025 Trustee Education Schedule



July 20-25, 2025

Le Westin Montréal
Montréal, Québec
*(held in conjunction with the Canadian Public
Sector Pensions and Benefits Conference)*

September 6-7, 2025

Delta Hotels St. John's
Conference Centre
St. John's, Newfoundland
and Labrador
(ATMS only)
*(held in conjunction with the Canadian
Investment Institute)*

November 21-23, 2025

Hilton San Diego Bayfront
San Diego, California
*(held in conjunction with the 58th Annual
Canadian Employee Benefits Conference)*

FTMS[®], ATMS[™] and MTMS— Your Path for Trustee Education

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 programs provide the ideal blend of knowledge, skills and experience needed for 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.

Who Should Attend

These programs are for multi-employer, public sector and corporate plan trustees/fiduciaries as well as benefit office staff who serve on any of the following plans:

- Defined benefit (DB) plans
- Defined contribution (DC) plans
- Target benefit plans (TBPs)
- Health and welfare plans
- Employee life and health trusts (ELHTs).



Education Doesn't Need to Feel Daunting

By attending these programs, you will receive expert instruction from professionals in your field while working alongside your fellow trustees. Through engaging discussion, you will gain insight, participate in real-life case studies and come away with applicable takeaways for improving your fund strategy. After your session, you will have 60 days to pass the accompanying online exam. The open-book, multiple-choice exam gives you time to review your notes and find the correct answers.

Don't be intimidated—Over 90% of attendees pass on their first attempt!

Register online at www.ifebp.org/cdtrusteepath | Questions? Call (833) 886-3749.



Earning Your Certificate of Achievement or Credential

FTMS

To earn your FTMS Certificate of Achievement, you need to:

- Attend the two-day course or the online training
- Complete the FTMS online exam with a score of 70% or higher.

ATMS

To earn the ATMS Certificate of Achievement, you need to:

- Have completed the FTMS Certificate of Achievement or passed the ATMS Qualifying Test
- Attend Sessions A and B
- Complete both online exams with a score of 70% or higher.

MTMS

To earn the MTMS credential, you need to:

- Have completed the ATMS Certificate of Achievement
- Attend Sessions A and B, with relevant prework
- Complete both online exams with a score of 70% or higher.

**The open-book, multiple-choice exam gives you time to review your notes and find the correct answers.
Don't be intimidated—Over 90% of attendees pass on their first attempt!**

FTMS | FOUNDATIONS OF TRUST MANAGEMENT STANDARDS®

www.ifebp.org/ftms



Are you a new trustee looking to get up to speed on the basics of trust management? Attend the Foundations of Trust Management Standards (FTMS) program and get the knowledge you need to help ensure your plan's success.

FTMS is the first step on the trustee education path, focused on the needs of new Canadian multi-employer, public and corporate sector plan trustees.

In this two-day program, you will have an opportunity to network and share experiences with other new trustees while gaining the need-to-know skills to succeed in your role.

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.

We fondly recognize Paul Mitchell for his significant contributions to the development of the FTMS program.

Register online at www.ifebp.org/cdtrusteepath | Questions? Call (833) 886-3749.



www.ifebp.org/atms

Designed for the needs of experienced trustees, Advanced Trust Management Standards (ATMS) will give you the tools you need not only to be successful in your role as a trustee but also to look toward the future and prepare your plan for the challenges ahead.

For trustees who have either completed the FTMS Certificate of Achievement or passed the ATMS Qualifying Test, this is the perfect opportunity to continue your trustee training. Trustees will learn about more detailed applications, including case studies on pension and health and welfare plans. You will feel more competent and confident in your role as you look toward making strategic decisions for the future.

Who Should Attend

This course is recommended for advanced-level appointed and elected multi-employer, public sector and corporate plan trustees/fiduciaries of any type of trust; members of pension advisory or benefit committees; and benefit office staff.



Session A

Legal, Administration, Health and Welfare Plans, Pension Plans (two-day program)

Session B

Funding/Investment/Finance Pension Plans and Health and Welfare Plans (two-day program)

MTMS | MASTER OF TRUST MANAGEMENT STANDARDS

www.ifebp.org/mtms

For those who have completed both FTMS and ATMS, Master of Trust Management Standards (MTMS) is for leaders who are ready to leverage their own unique leadership strengths and skills to optimize their contribution.

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

This program is highly interactive, focusing on the evaluation and creation of new points of view and on behavioural change in the areas of leadership, governance, oversight, strategic planning and risk management. The program includes capstone mock board meetings so you can apply what you've learned.

This program is the culmination of your Canadian trustee education path! Once you have met your MTMS requirements, you can proudly display your MTMS credential, confirming your expertise in Canadian trustee management.



Session A

Leadership, Governance,
Oversight (two-day program)

Session B

Leadership, Strategic
Planning, Risk Management
(two-day program)

MTMS | ADVANCED LEADERSHIP SUMMIT

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

This half-day workshop will provide practical tips and skills that trustees need in order to develop working relationships that operate with minimal conflict and a high level of trust and confidence. The topic focus of the MTMS Advanced Leadership Summit changes each year to reflect the most essential issues facing trustees.

Visit www.ifebp.org/mtmssummit for more details and updates.



November 23, 2025

8:00 a.m.-12:00 noon

**Hilton San Diego Bayfront
San Diego, California**

*(held in conjunction with the 58th Annual
Canadian Employee Benefits Conference)*

Canadian
Public Sector
Pensions and Benefits Conference

July 22-23, 2025

Le Westin Montréal
Montréal, Québec

Register today at www.ifebp.org/canadape

Explore opportunities to refine your plan and pave the way for success at the Canadian Public Sector Pensions and Benefits Conference. Join leaders from across the country to tackle the unique challenges and opportunities encountered by the public sector, such as the future of the public workforce, equity and accessibility considerations for pension and benefit plans, and the impact of technology.



Canadian
Investment Institute

September 8-10, 2025

Delta St. John's Hotel and Conference Centre
St. John's, Newfoundland

Register today at www.ifebp.org/canadainvest

Attend the Canadian Investment Institute, and 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. This program is a must-attend conference to fully understand the potential available for your fund's future successes.



2025
58TH ANNUAL
CANADIAN

EMPLOYEE BENEFITS CONFERENCE

November 23-26, 2025
Hilton San Diego Bayfront
San Diego, California
Preconferences: November 21-23



www.ifebp.org/canannual

Through life milestones, economic turns and unexpected events, the one item that will never falter is the solid education you will get at the 58th Annual Canadian Employee Benefits Conference. Sessions provide comprehensive education on the issues most impacting your plans and members. Attend a preconference offering and stay for Wednesday's finale keynote session.

Preconference Offerings

- Health, Wealth and Happiness—
Planning Your Path to A Successful Retirement Parts 1 and 2
- Foundations of Trust Management Standards (FTMS)
- Advanced Trust Management Standards (ATMS)
- Master of Trust Management Standards (MTMS)
- MTMS Advanced Leadership Summit

Keynote Presenters

November 23, 2025

The Honourable Chantal Petitclerc, CC, CQ, MSM
Senator, Paralympic Champion

November 24, 2025

Pamela Barnum
Former Undercover Police Officer and Federal Prosecuting Attorney

November 26, 2025

Alika Lafontaine, M.D., FRCPC
First Indigenous Physician and the Youngest Doctor to Lead the Canadian Medical Association (CMA)

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit when you register at least 60 days prior to the beginning of the program so the Foundation can seek preapproval from the governing agency.

Note: Requests made for CE credit do not guarantee administration of credit.

For CE inquiries, please contact the International Foundation Continuing Education Department at (905) 361-2822 or toll-free at (833) 886-3749, or email continuinged@ifebp.org.

CEBS® COMPLIANCE CREDIT



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

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within three days (eight days for Disney properties) of arrival. Registration fee is forfeited once program commences. Visit www.ifebp.org/policies for details on the current policy.

QUESTIONS?

Visit www.ifebp.org/cdtrusteepath for frequently asked questions about the FTMS, ATMS and MTMS certificate programs, or call (262) 373-7713 for further information.



FTMS®/ATMS™/MTMS 2025 Offerings



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Only



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International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA



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