

# Investments Institute

**April 30-May 1, 2025**

Luminary Hotel & Co. | Fort Myers, Florida

**What Will the  
New Administration Mean for  
Your Pensions and Assets?**

**Register by March 17 to save \$300.  
[www.ifebp.org/investments](http://www.ifebp.org/investments)**

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International Foundation   
OF EMPLOYEE BENEFIT PLANS

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The coming year is set to significantly impact pension investors. As a fiduciary, your role is to capitalize on these changes and maximize investment returns for your plan members. What will a new administration, easing interest rates and favorable jobs data mean for the plans you oversee? The Investments Institute will provide the most relevant sessions led by industry experts, equipping you with the insights, skills and strategies you need to help ensure your fund's long-term success.

## Who Should Attend

The Investments Institute is designed for individuals involved in setting investment policy for defined benefit and defined contribution retirement plans, health and welfare plans, and joint apprenticeship and training committees, including:

- Trustees
- Administrators and staff
- Corporate officers and executives
- Finance personnel.

## Benefits of Attending

- Learn from highly regarded experts in the field of investing.
- Network with peers who are facing similar challenges.
- Hear current perspectives on the global economy.
- Discuss your fund's strategies with peers from other benefit plans.
- Take advantage of the intimate learning environment and get your specific questions answered.

## Top Past Attendee Titles

- Trustee
- President
- Vice President
- Executive Director
- Chairman
- Administrator
- Director
- Managing Director
- Labor Trustee
- Management Trustee

# PROGRAM AT A GLANCE

<b>WEDNESDAY   April 30, 2025</b>	
<b>8:15-9:30 a.m.</b>	Navigating a Transforming Market
<b>9:45-10:45 a.m.</b>	Advanced Asset Management: Strategies for a Stronger Portfolio
<b>11:00 a.m.-12:00 noon</b>	Historical Transitions and Current Strategies for Fixed Income
<b>1:15-2:15 p.m.</b>	Real Estate Investments: Assessing Long-Term Prospects and Risks
<b>2:30-3:30 p.m.</b>	3 for 60 Investment Roundtables
<b>THURSDAY   May 1, 2025</b>	
<b>8:30-9:30 a.m.</b>	Analyzing and Identifying Opportunities in Public Equity
<b>9:45-10:45 a.m.</b>	How AI Is Disrupting Markets and Reshaping the Investment Industry
<b>11:00 a.m.-12:00 noon</b>	Designing Effective DC Plans: Aligning Goals and Overcoming Challenges
<b>1:15-2:15 p.m.</b>	Mastering Private Equity: Strategies, Insights and Risk Mitigation
<b>2:30-3:30 p.m.</b>	Decoding Private Credit: Strategies and Insights

*All times are listed in Eastern Time.*

*Breakfasts, lunches and welcome reception included!*

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## PROGRAM SCHEDULE

*All times are listed in Eastern Time.*

### TUESDAY | April 29, 2025

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3:00-5:00 p.m.

#### **Registration/Information**

### WEDNESDAY | April 30, 2025

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7:30-8:15 a.m.

#### **Continental Breakfast** *(provided)*

7:30 a.m.-4:30 p.m.

#### **Registration/Information**

8:15-9:30 a.m.

#### **Navigating a Transforming Market**

Explore what the implications of a new White House administration, the Federal Reserve's interest rate cuts and a strong job market mean for pension plans. Understand how these factors will shape the near-term strategies and opportunities for institutional investors.

9:45-10:45 a.m.

#### **Advanced Asset Management: Strategies for a Stronger Portfolio**

Examine advanced techniques in asset management—including diversification, rebalancing and liquidity management—to meet your plan objectives. This session will also explore the roles of different asset classes in optimizing portfolio performance. Understand where your plan is achieving expected returns and how to mitigate risk from market volatility and regulatory uncertainties.

**Register by March 17 to save \$300 with the early registration discount!**

## WEDNESDAY | April 30, 2025 *(continued)*

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11:00 a.m.-12:00 noon

### **Historical Transitions and Current Strategies for Fixed Income**

This session will review the historical transitions of fixed income markets and their implications for today's investors. Understand the impact of interest rates on portfolios and explore the different sectors, including credit quality and duration, on bond prices and yields. Learn how to compare your beginning-year model to your end-of-year model and discover advanced bond trading strategies to improve liquidity and efficiency.

12:00 noon-1:15 p.m.

### **Lunch *(provided)***

1:15-2:15 p.m.

### **Real Estate Investments: Assessing Long-Term Prospects and Risks**

With rising leverage costs and development expenses, real estate investments are under threat. This panel discussion will examine the long-term prospects of real estate within pension portfolios and explore whether investors need to reassess the risk/return profile of this asset class.

2:30-3:30 p.m.

### **3 for 60 Investment Roundtables**

Engage in three 20-minute, thought-provoking roundtable discussions with attendees about issues important to you and your plans. This session will allow you to interact with and learn from attendees across the country.

3:30-4:30 p.m.

### **Welcome Reception (Guests Welcome)**

Refreshments and light hors d'oeuvres will be served.

## THURSDAY | May 1, 2025

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7:30 a.m.-4:30 p.m.

### **Registration/Information**

7:30-8:30 a.m.

### **Continental Breakfast *(provided)***

8:30-9:30 a.m.

### **Analyzing and Identifying Opportunities in Public Equity**

Public equity funds have been placed under the microscope recently. This session will dive into how to analyze and identify undervalued and overvalued stocks, and how to manage beta risk. Additionally, it will explore the merits of growth, value and international equity for your portfolios.

9:45-10:45 a.m.

### **How AI Is Disrupting Markets and Reshaping the Investment Industry**

See how artificial intelligence (AI) is transforming asset pricing, trading and portfolio management. Understand the opportunities and challenges of investing in AI-driven companies and technologies. Gain insights into how AI innovations are expected to disrupt markets and reshape the financial industry.

11:00 a.m.-12:00 noon

### **Designing Effective DC Plans: Aligning Goals and Overcoming Challenges**

Learn how to design a DC plan that aligns with both employer and employee goals and expectations. Understand the importance of choice, education and default options in plan design. Discover strategies to overcome behavioral biases and financial illiteracy among DC plan participants.

## THURSDAY | May 1, 2025 *(continued)*

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12:00 noon-1:15 p.m.

**Lunch** *(provided)*

1:15-2:15 p.m.

### **Mastering Private Equity: Strategies, Insights and Risk Mitigation**

This session will dive into the intricate world of private equity and explore why companies choose to go private, how to evaluate funds and how funds can mitigate risk while investing in these funds.

2:30-3:30 p.m.

### **Decoding Private Credit: Strategies and Insights**

This session will examine private credit markets, exploring each market's growth to its current size. It will offer insights for investors on how to identify and analyze opportunities across the capital structure, as well as examine recent performance trends and consider future market outlooks.

**Register by March 17 to save \$300.**  
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# Hotel Information

## Luminary Hotel & Co. Fort Myers, Florida

**Name:** Luminary Hotel & Co.

**Reservation Deadline:** March 17, 2025

**Rates:** US\$249 Single/Double Occupancy (One King Bed)

**Hotel Accommodations:** You will be charged a \$400 deposit upon registration. Please specify your hotel requirements on the registration form.

For additional hotel information, visit our Hotel/Travel tab at [www.ifebp.org/investments](http://www.ifebp.org/investments)

*\*Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

### Hotel Details

The Luminary Hotel & Co. is an exceptional destination nestled in the heart of Fort Myers, Florida. Each room features plush bedding, contemporary furnishings and upscale amenities, including high-speed Wi-Fi, flat-screen TVs and coffee makers. Many accommodations also offer stunning views of the city skyline or the Caloosahatchee River.

### Location Details

Situated in the thriving downtown district, Luminary Hotel & Co. provides guests with easy access to Fort Myers' cultural and entertainment hubs. Explore the nearby River District, indulge in local dining or take a stroll along the picturesque waterfront—Everything you need is right at your doorstep.





# Sponsorship Opportunities

Sponsors will gain valuable exposure for their organizations when they network with **experienced** trustees, administrators, corporate officers and finance personnel who are involved with setting and managing their investment policies for both defined benefit and defined contribution plans.

## Platinum Sponsorship

### ***Exclusive Specialty-Conference Lanyards for a Year!***

Opportunity for one organization to sponsor attendee lanyards used at six specialty conferences within the year. Sign up early to take full advantage of this opportunity!



## Gold Sponsorships

### ***Conference App, Attendee Lunch OR Specialty Conference Bundle Discount***

Sponsor any three or more specialty conferences at the Gold Level within a calendar year and receive a 20% discount on each sponsorship.



## Silver Sponsorships

### ***Continental Breakfast***



## Bronze Sponsorships

### ***Refreshment Break***



Sponsorships at each level are recognized in a variety of ways, including on the conference web page and in preconference promotions, on conference signage and table tent cards at the sponsored event, with a company listing in the conference app, with **complimentary or discounted conference registrations, and more!**

**Contact us today!** Diane Mahler | (262) 373-7656 | [dianem@ifebp.org](mailto:dianem@ifebp.org)

**Learn more at [www.ifebp.org/sponsorships](http://www.ifebp.org/sponsorships).**

**Oversee health care funds?  
Extend your education and attend:**

# Health Care Management Conference

**April 28-29, 2025** | Fort Myers, Florida

Looking to extend your education? Attend the Health Care Management Conference held before the Investments Institute.

## **A Forward-Looking Approach to Cost Containment**

Health fund fiduciaries are presented with a nearly impossible task: offering comprehensive coverage that attains high outcomes, is equitable and is cost effective. Achieving these goals in the face of new therapies; annual, double-digit cost increases; and rapidly expanding technologies can be daunting. This year's conference will take a proactive approach to cost containment, identifying current and future trends that are, and will be, impacting your plan. Conference sessions will be hands-on and practical, combining lecture-based presentations, case studies and roundtable discussions.

### **Who Should Attend**

- Trustees of multiemployer trust funds of any size
- Third-party and salaried administrators and key staff
- Members of bargaining committees
- Fiduciaries, staff and trustees from governmental plans

### **Select Sessions Include**

- The Role of Artificial Intelligence in Health Benefits
- The State of the Union of GLP-1 Drug Coverage
- Supporting Women in the Workforce
- Providing Care for an Aging Population



## REGISTRATION

Go to [www.ifebp.org/investments](http://www.ifebp.org/investments) to register.

### CONFERENCE REGISTRATION FEES

Through March 17, 2025—Member: US\$1,750 | Nonmember: US\$1,970

After March 17, 2025—Member: US\$2,050 | Nonmember: US\$2,270

Save \$300 when you register before March 17, 2025.

## POLICIES

Cancel and transfer fees are based on registration fee paid 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within 3 days (8 days for Disney properties) of arrival. Registration fee is forfeited once the program commences. For details, see [www.ifebp.org/policies](http://www.ifebp.org/policies).

## CONTINUING EDUCATION CREDIT

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

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



Educational sessions at this program can qualify for CEBS® Compliance credit. Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.



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