

# EMPLOYEE BENEFITS EDUCATION 2025

TRAINING

RESEARCH

COMMUNITY

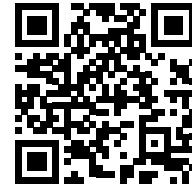
PROFESSIONAL  
DEVELOPMENT

# FUEL YOUR WORK THROUGH EDUCATION

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

*Let the International Foundation fuel your work through education.*

Learn More:



### WHY CHOOSE THE FOUNDATION FOR YOUR EDUCATION?

If you work in employee benefits, no day is ever the same. The last thing you want to spend your time researching is where to find vetted, impartial, quality education and information to stay compliant and 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.

### BE PART OF SOMETHING BIG.

Choose from **over 25** in-person conferences and courses

Learn from wherever you are **through 5** virtual conferences

Brush up on important topics **through 46** e-learning courses

Dig into the details through **10** toolkits

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

Demonstrate your commitment to the industry **with 3** professional designations

Benchmark your plans **through 9** survey reports

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

Stand out **with 13** certificates (in person or online)

Tune into **22** new webcasts

# PROGRAMS BY TOPIC

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

## HEALTH CARE

### In-person conferences:

- Annual Employee Benefits Conference
- Art & Science of Health Promotion Conference
- Health Benefits Conference & Expo (HBCE)
- Health Care Management Conference

### Virtual conferences:

- Mental Health in the Workplace
- Men's and Women's Well-Being at Work

### In-person certificates:

- Certificate in Health and Welfare Plans

### Online certificates:

- Certificate in Health Plan Navigation
- Fundamentals in Health Benefits

## ORGANIZATIONAL WELLNESS

### In-person conferences:

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

### Virtual conferences:

- Mental Health in the Workplace
- Men's and Women's Well-Being at Work

## RETIREMENT

### In-person certificate:

- Annual Employee Benefits Conference
- Certificate in Retirement Plans

### Online certificate:

- Fundamentals in Retirement Plans

## GLOBAL

### In-person conferences:

- CONNECT Global Employee Benefits and Workforce Strategies Summit

### In-person certificates:

- Certificate in Canadian Benefit Plans
- Certificate in Global Benefits Management

### Virtual workshop:

- Global Benefits Fundamentals

## COMPLIANCE AND BENEFITS MANAGEMENT

### In-person conferences:

- Accounting and Auditing Institute for Employee Benefit Plans
- Advanced Trustees and Administrators Institute
- Annual Employee Benefits Conference
- Collection Procedures Institute
- Fraud Prevention Institute for Employee Benefit Plans
- Institute for Apprenticeship, Training and Education Programs
- Investments Institute
- ISCEBS Employee Benefits Symposium
- New Trustees Institute—Level I: Core Concepts
- Portfolio Concepts and Management
- Trustees Institute—Level II: Concepts in Practice
- Washington Legislative Update

### In-person certificates:

- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Multiemployer Plan Administration
- Certificate in Public Sector Benefits Administration
- Certificate in Strategic Benefits Management

### Online certificates:

- Certificate in Absence Management
- Certificate in ERISA Compliance
- Certificate in Multiemployer Plan Auditing
- Certificate in Self-Funding Group Health Plans

**Over 40 e-learning courses cover a range of topics. See pages 26-31 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 PLAN SPONSORS CP

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 G

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 ME

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 PE

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:**

Training  
for your role

In-person  
conferences/  
courses

In-person  
certificates

Online  
certificates

E-learning  
courses



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

## 71st ANNUAL Employee Benefits Conference

**71st Annual Employee Benefits Conference** ME PE

*Virtual option available | Preconferences available*

November 9-12, 2025 | Honolulu, Hawai'i  
[www.ifebp.org/usannual](http://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 71st 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!**

72nd Annual Employee Benefits Conference  
October 25-28, 2026 | New Orleans, Louisiana

44TH ANNUAL  
**ISCEBS Employee Benefits**  
*Symposium*



**44th Annual ISCEBS  
Employee Benefits Symposium**

PE CP

September 14-17, 2025 | Minneapolis, Minnesota  
[www.ifebp.org/symposium](http://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 partner 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!**

45th Annual ISCEBS Employee Benefits Symposium  
August 23-26, 2026 | Phoenix, Arizona

# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## 35th Annual Art & Science of Health Promotion Conference

PE CP

*Intensive Training Seminars available*

March 31-April 4, 2025 | Scottsdale, Arizona

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

### Why You Should Attend:

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



## Health Care Management Conference

ME PE

April 28-29, 2025 | Fort Myers, Florida

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

ME PE

April 30-May 1, 2025 | Fort Myers, Florida

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.

# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## Portfolio Concepts and Management

May 12-15, 2025 | Philadelphia, Pennsylvania



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.

### Why You Should Attend:

- Learn the fundamental concepts needed for effective portfolio oversight.
- Obtain a solid grounding in the principles of modern portfolio theory.
- Gain practical experience needed to make sound investment management decisions.
- Apply what you have learned in an interactive case study.
- Learn from world-class faculty who are skilled educators and researchers, award-winning authors and leading authorities.



## Washington Legislative Update

May 19-20, 2025 | 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.



## Advanced Trustees and Administrators Institute

*Preconferences available*

June 23-25, 2025 | Nashville, Tennessee

February 23-25, 2026 | 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.



# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## Accounting and Auditing Institute for Employee Benefit Plans

June 23-25, 2025 | Nashville, Tennessee  
Virtual option available

ME

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.



## Fraud Prevention Institute for Employee Benefit Plans

July 14-15, 2025 | Chicago, Illinois

ME PE CP

Fraud can happen at any time, and it can cause major damage. Uncover emerging trends in fraud prevention, learn the latest in cybersecurity and data breaches, and receive guidance for internal controls and risk prevention.

### Why You Should Attend:

- Gain an understanding of where risks lie in your plan.
- Learn who may be potential fraudsters.
- Discover the steps to take and tips to immediately prevent fraud in your plan.



NEW

## Understanding Negotiated Employee Benefits

July 15-16, 2025 | Brookfield (Milwaukee), Wisconsin

ME PE CP

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.

### Why You Should Attend:

- Learn about the legal environment surrounding benefits and collective bargaining.
- Learn the fundamentals of health and retirement benefits.
- Identify ideas and strategies that work from your peers and industry experts.



## Designing Curriculum to Close the Skills Gap

July 22-23, 2025 | Brookfield (Milwaukee), Wisconsin

ME

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 Develop a Curriculum (DACUM) model—to deliver a more impactful apprenticeship program.

### Why You Should Attend:

- Improve program performance with greater learner efficiency, effectiveness and engagement.
- Learn how to analyze your training initiatives to ensure they are aligned and impactful.
- Build a curriculum road map that will prepare your program for success today and in the future.

# IN-PERSON CONFERENCES/COURSES

www.ifebp.org/education



## Annual Wellness Summit

*Preconferences available*

August 18-21, 2025 | Austin, Texas

PE CP

The Annual Wellness Summit combines two long-standing events—the WELCOA Summit and NWI's 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 information so you can 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.



## 44th Annual ISCEBS Employee Benefits Symposium

September 14-17, 2025 | Minneapolis, Minnesota

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



## Collection Procedures Institute

September 29-30, 2025 | Monterey, California

ME

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.

### Why You Should Attend:

- Gain necessary knowledge of current legal and trustee issues.
- Learn how to benchmark your policies and procedures so you can make the best decisions on behalf of your fund.
- Leave with helpful sample documents and checklists you can start using right away.
- Discover how recent key legal decisions impact your plans and what to do about it.

## » Sponsorship and Exhibitor Opportunities

Opportunities are available for many of the events listed.  
See page 32 for more information.



# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## 71st Annual Employee Benefits Conference

*Preconferences available*

November 9-12, 2025 | Honolulu, Hawai'i



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.



## Institute for Apprenticeship, Training and Education Programs

*Preconference available*

January 12-14, 2026 | San Juan, Puerto Rico

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.



## 35th Annual Health Benefits Conference & Expo (HBCE)

*Preconference available*

More information about the 2026 offering coming soon.



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.

# IN-PERSON COURSES

[www.ifebp.org/benefitscourses](http://www.ifebp.org/benefitscourses)

## Employee Benefits Courses and Certificates

*Formerly known as Certificate Series*

These in-person courses offer an immersive, hands-on learning experience designed to empower you with knowledge and insights. Start by taking a single course in a specific area of benefits, or take three courses to earn a topic-specific Certificate of Achievement.



**San Diego, California**  
**February 24-March 1, 2025**

### Courses Offered:

- 401(k) Plans
- Basic Compensation Concepts
- Basics of Employee Benefits Administration
- Communicating Employee Benefits
- Funding and Finance of Health Benefits
- Health Benefit Plan Basics
- Health Care Cost Management
- Investment Basics
- Organizational Strategies for Health and Financial Wellness
- Retirement Plan Basics



**Chicago, Illinois**  
**July 14-19, 2025**

### Courses Offered:

- Basics of Employee Benefits Administration
- Communicating Employee Benefits
- Funding and Finance of Health Benefits
- Health Benefit Plan Basics
- Health Care Cost Management
- Introduction to Public Sector Benefits Administration
- Multiemployer Plan Administration
- Organizational Strategies for Health and Financial Wellness
- Retirement Plan Basics
- Total Rewards and Workforce Strategies



**Austin, Texas**  
**October 6-11, 2025**

### Courses Offered:

- 401(k) Plans
- Ancillary Benefit Plans
- Basic Compensation Concepts
- Communicating Employee Benefits
- Health Benefit Plan Basics
- Health Care Cost Management
- Introduction to Public Sector Benefits Administration
- Investment Basics
- Organizational Strategies for Health and Financial Wellness
- Public Sector 401, 403 and 457 Plans
- Retirement Plan Basics
- Total Rewards and Workforce Strategies

# IN-PERSON CERTIFICATES

[www.ifebp.org/benefitscourses](http://www.ifebp.org/benefitscourses)

Take three designated courses to earn a topic-specific Certificate of Achievement. Certificates include:



## Benefit Plan Administration Certificate

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 resource strategies, risk management, communication, technology, funding/finance and vendor management, and it helps you adapt your total rewards strategies to your organization's needs.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Benefit Plan Administration Certificate   Take Required Courses</b>			
Basics of Employee Benefits Administration	February 24-25	July 14-15	
Communicating Employee Benefits	February 26-27	July 18-19	October 10-11
And Choose One			
Total Rewards and Workforce Strategies*		July 16-17	October 8-9
Funding and Finance of Health Benefits*	February 28-March 1	July 16-17	



## Benefits and Compensation Certificate

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.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Benefits and Compensation Certificate   Take Required Courses</b>			
Retirement Plan Basics*	February 28-March 1	July 18-19	October 6-7
Health Benefit Plan Basics*	February 24-25	July 14-15	October 8-9
Basic Compensation Concepts	February 26-27		October 10-11



## Health and Welfare Plans Certificate

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.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Health and Welfare Plans Certificate   Take Required Courses</b>			
Health Benefit Plan Basics*	February 24-25	July 14-15	October 8-9
Health Care Cost Management*	February 26-27	July 18-19	October 10-11
And Choose One			
Ancillary Benefit Plans			October 6-7
Funding and Finance of Health Benefits*	February 28-March 1	July 16-17	

\*This course applies to more than one certificate.

# IN-PERSON CERTIFICATES

www.ifebp.org/benefitscourses



## Multiemployer Plan Administration Certificate

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.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Multiemployer Plan Administration Certificate   Take Required Course</b>			
Multiemployer Plan Administration		July 14-15	
And Choose Two			
Retirement Plan Basics*	February 28-March 1	July 18-19	October 6-7
401(k) Plans*	February 24-25		October 8-9
Investment Basics*	February 26-27		October 10-11
Health Benefit Plan Basics*	February 24-25	July 14-15	October 8-9
Health Care Cost Management*	February 26-27	July 18-19	October 10-11



## Public Sector Benefits Administration Certificate

The public sector has unique characteristics that impact on 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.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Public Sector Benefits Administration Certificate   Take Required Course</b>			
Introduction to Public Sector Benefits Administration		July 16-17	October 6-7
And Choose Two			
Retirement Plan Basics*	February 28-March 1	July 18-19	October 6-7
Public Sector 401, 403 and 457 Plans*			October 8-9
Investment Basics*	February 26-27		October 10-11
Health Benefit Plan Basics*	February 24-25	July 14-15	October 8-9
Health Care Cost Management*	February 26-27	July 18-19	October 10-11

\*This course applies to more than one certificate.

# IN-PERSON CERTIFICATES

www.ifebp.org/benefitscourses



## Retirement Plans Certificate

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.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Retirement Plans Certificate   Take Required Courses</b>			
Retirement Plan Basics*	February 28-March 1	July 18-19	October 6-7
Investment Basics*	February 26-27		October 10-11
And Choose One			
401(k) Plans*	February 24-25		October 8-9
Public Sector 401, 403 and 457 Plans*			October 8-9



## Strategic Benefits Management Certificate

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 resource 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.

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
<b>Strategic Benefits Management Certificate   Take Required Courses</b>			
Organizational Strategies for Health and Financial Wellness	February 24-25	July 14-15	October 6-7
Total Rewards and Workforce Strategies*		July 16-17	October 8-9
Health Care Cost Management*	February 26-27	July 18-19	October 10-11

\*This course applies to more than one certificate.

# TRAINING FOR YOUR GLOBAL BENEFITS ROLE

[www.ifebp.org/global](http://www.ifebp.org/global)

## GLOBAL

The Foundation has curated a suite of global benefits education programs to provide the knowledge and skills needed to effectively manage a multinational workforce. From a live, instructor-led virtual training program to the culminating CONNECT event, this combination of learning opportunities is designed to set global professionals up for success in their role.



### Certificate in Global Benefits Management

February 24-28, 2025 | San Diego, California

July 14-18, 2025 | Chicago, Illinois

Gain the comprehensive knowledge needed to administer and manage a global benefits program. Receive a solid foundation of international benefits and regional benefits overviews of Europe, Latin America, Asia Pacific, the Middle East and Africa. Receive intensive training over 4½ days of instruction, allowing you to complete the certificate program in one trip.



### CONNECT Global Employee Benefits and Workforce Strategies Summit

July 21-23, 2025 | Dallas, Texas

CONNECT is tailor-made to help multinational employers understand key issues, trends and solutions for developing and maintaining a global total rewards strategy. Through real-life case studies, roundtable discussions, breakout sessions, an interactive resource/solutions center and a host of networking opportunities, this premier event is designed to connect the growing community of global professionals.



### Certificate in Canadian Benefit Plans

October 6-8, 2025 | Austin, Texas

This offering provides a solid introduction to Canadian employee benefits, pensions and human resources practices. Whether you work directly with a Canadian plan or are employed by a U.S. company with affiliates in Canada, you will gain practical and useful information about the Canadian pensions and benefits landscape.



### Global Benefits Fundamentals

December 2-3, 2025 | Online Workshop

This live online workshop 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.





# TRAINING FOR YOUR TRUSTEE ROLE

[www.ifebp.org/education](http://www.ifebp.org/education)

## Focused Learning for Multiemployer Trustees

Serving as a multiemployer trustee in today's world requires a deep understanding of wide-ranging issues—complex regulations, legislation, health care systems, investment strategies and more. The International Foundation offers expanded, targeted education for trustees as featured below:



### **New Trustees Institute—Level I: Core Concepts**

ME

June 23-25, 2025 | Nashville, Tennessee

November 7-9, 2025 | Honolulu, Hawai'i

February 23-25, 2026 | Orlando, Florida

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.



### **Trustees Institute—Level II: Concepts in Practice**

ME

June 21-22, 2025 | Nashville, Tennessee

November 8-9, 2025 | Honolulu, Hawai'i

February 21-22, 2026 | Orlando, Florida

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.



### **Trustees Masters Program (TMP)**

ME PE

November 8-9, 2025 | Honolulu, Hawai'i

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.



### **TMP Advanced Leadership Summit**

ME PE

November 9, 2025 | Honolulu, Hawai'i

TMP graduates have the opportunity to continue their learning and delve deeper into relevant topics critical to a fund's overall strategy. What will trustee leadership look like in the future? What are the challenges and prospective solutions for forward-thinking organizations? The topic focus of the TMP Advanced Leadership Summit changes each year to reflect the most essential issues facing trustees.

# TRAINING FOR YOUR TRUSTEE ROLE

[www.ifebp.org/public](http://www.ifebp.org/public)

## Education for Public Employer Trustees

The public sector has unique characteristics that impact how employee benefits are managed. Public employers are navigating a changing landscape while making sure employees are receiving high-quality benefits, managing costs and maintaining compliance with regulations.



**NEW**

### Public Plan Trustees Institute—Level I

July 15-16, 2025 | Chicago, Illinois

Fairmont Chicago, Millennium Park

*All sessions will take place at the Gleacher Center.*

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<sup>®</sup>) 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. The program will be offered in two levels, with the first offering of Level I in July of 2025.

#### Why You Should Attend:

- Discover a cost-effective way to get thorough, on-target information to assist you in policy-making decisions.
- Understand the role of trustees and their relationship to other public benefit plan functions.
- Gain firsthand knowledge shared by leading consultants and practitioners working with public sector employee benefits.
- Take away valuable resource materials for future reference.



### E-Learning Courses

Choose from more than 40 e-learning courses for comprehensive and interactive virtual training for you and your team. Go to pages 26-31 for a full list of course options.

[www.ifebp.org/elearning](http://www.ifebp.org/elearning)

# CUSTOMIZED EDUCATION FOR YOUR TEAM

[www.ifebp.org/onsite-education](http://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

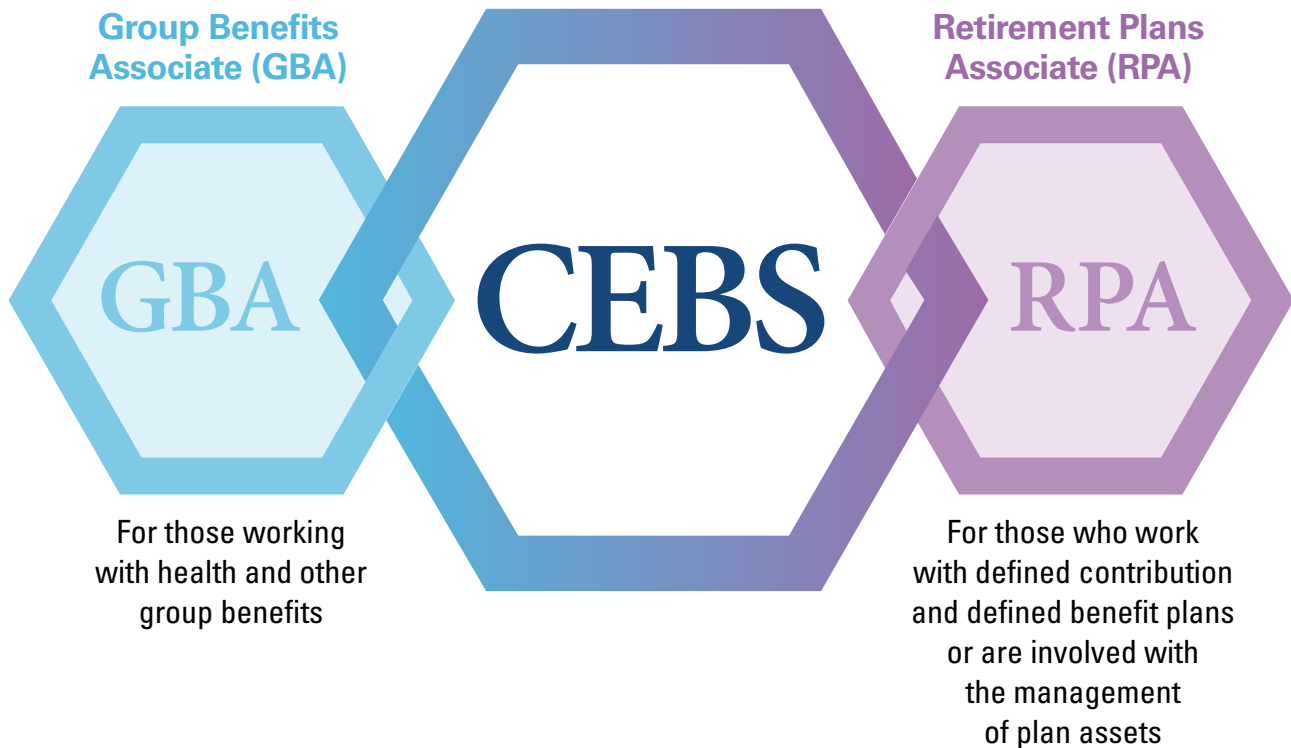
### Corporate/Single Employer Education

- 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

# EMPLOYEE BENEFITS DESIGNATIONS

[www.cebs.org](http://www.cebs.org)

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.



You'll learn from health and retirement curriculum—Streamlined core courses, laser-focused content, and less breadth and more depth mean now you can learn more in less time. To earn the CEBS designation, all five courses must be successfully completed. The GBA or RPA designation can be earned by completing three courses.

## COMPLIMENTARY WEBINAR

### Your Complete Guide to Earning the CEBS Designation

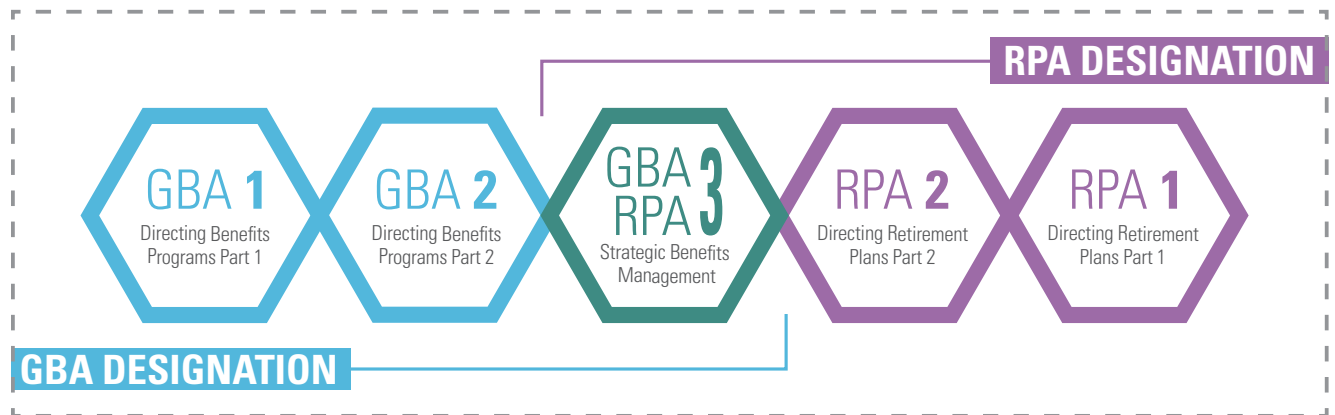
Want to know more about CEBS? Attend a free, 30-minute webinar and Q&A session (or watch a recording of a previous webinar).

[www.cebs.org/webinar](http://www.cebs.org/webinar)

# EMPLOYEE BENEFITS DESIGNATIONS

www.cebs.org

## CEBS Designation



### Group Benefits Associate (GBA)

The courses reflect up-to-date and relevant information—including the latest on health care—needed to effectively design, administer and communicate group benefits.

To earn the GBA designation, complete:

- GBA 1—Directing Benefits Programs Part 1
- GBA 2—Directing Benefits Programs Part 2
- GBA/RPA 3—Strategic Benefits Management (*this course also counts for credit toward the RPA designation*).

### Retirement Plans Associate (RPA)

The courses reflect the most current and relevant information needed to effectively design and manage retirement plans.

To earn the RPA designation, complete:

- RPA 1—Directing Retirement Plans Part 1
- RPA 2—Directing Retirement Plans Part 2
- GBA/RPA 3—Strategic Benefits Management (*this course also counts for credit toward the GBA designation*).

# 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 WITH



# VIRTUAL CONFERENCES

[www.ifebp.org/onlineworkshops](http://www.ifebp.org/onlineworkshops)

## Men's and Women's Well-Being at Work

June 2025 | Virtual Conference



Recognize the importance of men's and women's well-being with this two-day virtual conference. A variety of sessions will cover the health, happiness and security of both men and women at work. This event is co-sponsored by ISCEBS, the Wellness Alliance and the International Foundation.

## Accounting and Auditing Institute for Employee Benefit Plans

June 23-25, 2025 | 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.

## Mental Health in the Workplace

October 2025 | 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. The Mental Health in the Workplace virtual conference is co-sponsored by ISCEBS, the Wellness Alliance and the International Foundation.

## 71st Annual Employee Benefits Conference

November 9-12, 2025 | Virtual Conference



Can't join us in Honolulu this year? 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 12-14, 2026 | 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.



### Virtual Workshops

The International Foundation offers a variety of virtual workshops and trainings throughout the year. Visit us online for a listing of current virtual education opportunities.

[www.ifebp.org/onlineworkshops](http://www.ifebp.org/onlineworkshops)

# ONLINE CERTIFICATES

[www.ifebp.org/onlinecertificates](http://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\*

- Self-Funded Health Plan Basics
- Health Savings Accounts (HSAs)
- 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\*

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

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

*\*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](http://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

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

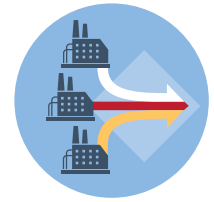
[www.ifebp.org/onlinecertificates](http://www.ifebp.org/onlinecertificates)

## 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 Structure and Administration
- Multiemployer Plan Accounting and Auditing



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## 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: Understanding Stop-Loss Insurance
- Self-Funded Health Plans: Plan Administration



# E-LEARNING COURSES

[www.ifebp.org/elearning](http://www.ifebp.org/elearning)

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](http://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](http://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](http://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).



### **E-learning courses qualify for CEBS Compliance credit.**

The International Foundation has general 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](http://www.ifebp.org/elearningce).

# E-LEARNING COURSES

[www.ifebp.org/elearning](http://www.ifebp.org/elearning)

## **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](http://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.



### **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](http://www.ifebp.org/webcasts)

# REACH OUR MEMBERS

[www.ifebp.org/exhibitsponsor](http://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 Wellness Summit
- Art & Science of Health Promotion Conference
- CONNECT Global Employee Benefits and Workforce Strategies Summit
- Health Benefits Conference & Expo (HBCE)
- Trustees and Administrators Institutes



**ADVERTISING,  
EXHIBIT AND  
SPONSORSHIP  
OPPORTUNITIES:**

[ifexpo@ifebp.org](mailto:ifexpo@ifebp.org)



## SPONSOR

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

- Annual Employee Benefits Conference
- Annual ISCEBS Employee Benefits Symposium
- Annual Wellness Summit
- Art & Science of Health Promotion Conference
- CONNECT Global Employee Benefits and Workforce Strategies 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+ employer trustees, administrators and benefit plan professionals. Print and digital options 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.
- 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 employee benefits, compensation and human resources–related products and services.



# INTERNATIONAL FOUNDATION MEMBERSHIP

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



## STAY COMPLIANT

### Legislative and Regulatory Updates

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

- [www.ifebp.org/news/regulatoryupdates](http://www.ifebp.org/news/regulatoryupdates)
- [www.ifebp.org/resources/legislative](http://www.ifebp.org/resources/legislative) (U.S.)
- [www.ifebp.org/resources/cnlegislative](http://www.ifebp.org/resources/cnlegislative) (Canada).

### 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

### 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](http://www.ifebp.org/jobsinbenefits) to explore more.

### Foundation Community

Chat directly with your peers and learn from others' conversations at [www.ifebp.org/community](http://www.ifebp.org/community).

### Personalized Research Service

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



## SAVE TIME

### Benefits Knowledge Center

Locate over 13,000 resources, including articles, court cases, survey reports, InfoQuicks and sample documents, on a variety of U.S. and Canadian 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, education benefits, 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. For a full listing, visit [www.ifebp.org/webcasts](http://www.ifebp.org/webcasts).

### Benefits Magazine (U.S.) and Plans & Trusts (Canada)

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month. Visit [www.ifebp.org/magazines](http://www.ifebp.org/magazines) to view the electronic versions.

### Toolkits

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



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International Foundation  
OF EMPLOYEE BENEFIT PLANS 

(888) 334-3327 | [www.ifebp.org](http://www.ifebp.org)

# CONTINUING EDUCATION

[www.ifebp.org/ce](http://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 in all states 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](http://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](mailto:continuinged@ifebp.org).



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

**Phone:** (262) 786-6710, option 2  
**Email:** [continuinged@ifebp.org](mailto:continuinged@ifebp.org)  
**Online:** [www.ifebp.org/ce](http://www.ifebp.org/ce)

## 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

The International Foundation is recognized by the Society for Human Resource Management (SHRM) to offer professional development credits (PDCs) for the SHRM-CP<sup>SM</sup> or SHRM-SCP<sup>SM</sup> designations.

## 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](http://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.

# GET INVOLVED

[www.ifebp.org/getinvolved](http://www.ifebp.org/getinvolved)

The Foundation depends on collaborative efforts between the U.S. and Canadian board and committee members as well as staff and member feedback to stay on the pulse of industry issues and needs. Over 180 trustees, administrators and benefits professionals serve within the Foundation's board and committee structure and contribute their expertise to develop educational content and other services.

## 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 a 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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### **Mission Statement**

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.