

Employee Benefits Courses and Certificates



February 24-March 1, 2025
San Diego, California

July 14-19, 2025
Chicago, Illinois



October 6-11, 2025
Austin, Texas



**Build a personalized educational
experience that works for you!**

Employee Benefits Courses

Formerly known as Certificate Series.

Stay ahead in managing and supporting your benefits and compensation plans with confidence! These in-person courses offer an immersive, hands-on learning experience designed to empower you with knowledge and insights. Dive deep into the history, evolution and latest trends in benefits through engaging, interactive lectures and real-world case studies. Gain the expertise you need to make impactful decisions and elevate your organization's understanding of employee benefits.

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
- Ancillary Benefit Plans
- Basic Compensation Concepts
- Basics of Employee Benefits Administration
- Certificate in Global Benefits Management*
- 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
- Total Rewards and Workforce Strategies

*Four-and-a-half-day course

Pricing available on page 7.



Chicago, Illinois | July 14-19, 2025

Courses offered:

- Basics of Employee Benefits Administration
- Certificate in Global Benefits Management*
- 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
- Public Plan Trustees Institute—Level I
- 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
- Certificate in Canadian Benefit Plans**
- 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

*Four-and-a-half-day course

**Three-day course

Pricing available on page 7.

Course Descriptions

401(k) Plans

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

Ancillary Benefit Plans

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

Basic Compensation Concepts

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

Basics of Employee Benefit Administration

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

Communicating Employee Benefits

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

Funding and Finance of Health Benefits

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

Course Descriptions

Health Benefit Plan Basics

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

Health Care Cost Management

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

Introduction to Public Sector Benefits Administration

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

Investment Basics

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

Multiemployer Plan Administration

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

Course Descriptions

Organizational Strategies for Health and Financial Wellness

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

Public Plan Trustees Institute—Level I

Gain a strong understanding of policy-making decisions, the role of trustees and their relationship to benefit plan functions, and benchmarking data. Network with peers in the public sector while learning from leading consultants and practitioners of public sector benefits.

Public Sector 401, 403 and 457 Plans

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

Retirement Plan Basics

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

Total Rewards and Workforce Strategies

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

2025 Pricing

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



Two-Day Courses

Member: US\$1,700
Nonmember: US\$1,920

Four-and-a-Half-Day Courses

Member: US\$3,325
Nonmember: US\$3,655

Chicago, Illinois | July 14-19, 2025



Two-Day Courses

Through June 2, 2025
Member: US\$1,400
Nonmember: US\$1,620

After June 2, 2025
Member: US\$1,700
Nonmember: US\$1,920

Four-and-a-Half-Day Courses

Through June 2, 2025
Member: US\$3,025
Nonmember: US\$3,355

After June 2, 2025
Member: US\$3,325
Nonmember: US\$3,655

Public Plan Trustees Institute—Level I • July 15-16

Through June 2, 2025
Member: US\$1,400
Nonmember: US\$1,620

After June 2, 2025
Member: US\$1,700
Nonmember: US\$1,920

Austin, Texas | October 6-11, 2025



Two-Day Courses

Through August 25, 2025
Member: S\$1,400
Nonmember: US\$1,620

After August 25, 2025
Member: US\$1,700
Nonmember: US\$1,920

Three-Day Courses

Through August 25, 2025
Member: US\$1,750
Nonmember: US\$2,080

After August 25, 2025
Member: US\$2,050
Nonmember: US\$2,380

Earn a Certificate in Achievement

As you move through the employee benefits courses, make your plan to earn a Certificate of Achievement in your desired employee benefits and compensation subject.

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.



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.



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.



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.



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.



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.



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.



Canadian Benefit Plans Certificate

The Certificate in Canadian Benefit Plans is a three-day course—the perfect opportunity to introduce you to the world of Canadian employee benefits, pensions and human resources (HR) practices. Gain a comprehensive understanding of the business environment, delve into the complexities of health care and retirement systems, and explore practical case studies that will enhance your expertise in Canadian plans.



Global Benefits Management Certificate

The Certificate in Global Benefits Management provides the comprehensive knowledge needed to administer and manage a global benefits program. Employers that work globally must learn to navigate the increasingly complex challenges of international benefits and cultural expectations. Learn from global industry experts while you earn your certificate.

2025 Schedule at a Glance

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
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Health and Welfare Plans Certificate | Take Required Courses

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	February 28-March 1		October 6-7
Funding and Finance of Health Benefits*	February 28-March 1	July 16-17	

Retirement Plans Certificate | Take Required Courses

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

Benefit Plan Administration Certificate | Take Required Courses

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*	February 28-March 1	July 16-17	October 8-9
Funding and Finance of Health Benefits*	February 28-March 1	July 16-17	

Benefits and Compensation Certificate | Take Required Courses

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

* This course applies to more than one certificate.

2025 Schedule at a Glance

Course Name	FEBRUARY/MARCH San Diego, CA	JULY Chicago, IL	OCTOBER Austin, TX
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Strategic Benefits Management Certificate | Take Required Courses

Organizational Strategies for Health and Financial Wellness	February 24-25	July 14-15	October 6-7
Total Rewards and Workforce Strategies*	February 28-March 1	July 16-17	October 8-9
Health Care Cost Management*	February 26-27	July 18-19	October 10-11

Public Sector Benefits Administration Certificate | Take Required Course

Introduction to Public Sector Benefits Administration		July 16-17	October 6-7
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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

Multiemployer Plan Administration Certificate | Take Required Course

Multiemployer Plan Administration		July 14-15	
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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

Global Benefits Management Certificate | Four-Day Required Course

Global Benefits Management	February 24-28	July 14-18	
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Canadian Benefit Plans Certificate | Three-Day Required Course

Canadian Benefit Plans			October 6-8
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Public Plan Trustees Institute—Level I | July 15-16

*This course applies to more than one certificate.

Bring Training Wherever You Are

The International Foundation is committed to ensuring that training for your role is available for whatever best fits your schedule and availability. Take courses and train your team online, or bring the education to your organization with on-site education.

Online Learning Certificates and Courses

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

Bring Employee Benefits Courses to You

Host world-class training at your organization. Drawing on our experience as a leading provider of employee benefits education, we will work with you to assess your specific needs and format a program that meets your organization's training goals. On-site programs save on travel costs and time away from the office while providing a one-of-a-kind learning opportunity for your staff. Let's develop an education strategy together.

Please contact Nick Olig at (262) 373-7622 or nicko@ifebp.org for more information or to set up an on-site program. Learn more at www.ifebp.org/onsite-education.



E-Learning Courses

Learn on your schedule with self-paced online courses developed by industry experts. Choose à la carte from a variety of benefits topics including health care, retirement and compliance. Note that many of these courses count toward online certificates.

Health Courses

- COBRA
- Flexible Spending Accounts (FSAs)
- Health Care Cost and Quality
- Health Care Delivery Models
- Health Insurance Basics
- Health Literacy
- Health Reimbursement Arrangements
- Health Savings Accounts
- HIPAA Privacy
- HIPAA Security
- Introduction to Group Health Plans
- Overview of ACA
- Overview of Disability Plans
- Overview of Exchanges
- Overview of Prescription Drugs
- Retiree Health Care
- Self-Funded Health Plan Basics
- Self-Funded Health Plans: Cost-Containment Strategies
- Self-Funded Health Plans: Plan Administration
- Self-Funded Health Plans: Understanding Stop Loss Insurance
- Workforce Wellness

Retirement Courses

- 401(k) Plans
- Defined Benefit Plans
- Defined Contribution Plans
- Overview of Retirement Plans
- Retirement Plan Investments and Vendor Management
- Understanding Social Security

General Courses

- Americans With Disabilities Act (ADA)
- ERISA
- Family and Medical Leave Act (FMLA)
- Fiduciary Responsibility for ERISA Plans
- Leave Program Design and Administration
- Life and Accidental Death and Dismemberment (AD&D) Insurance
- Managing Absence and Productivity Issues
- Multiemployer Plan Accounting and Auditing
- Multiemployer Plan Structure and Administration

For more information, please visit www.ifebp.org/elearning.

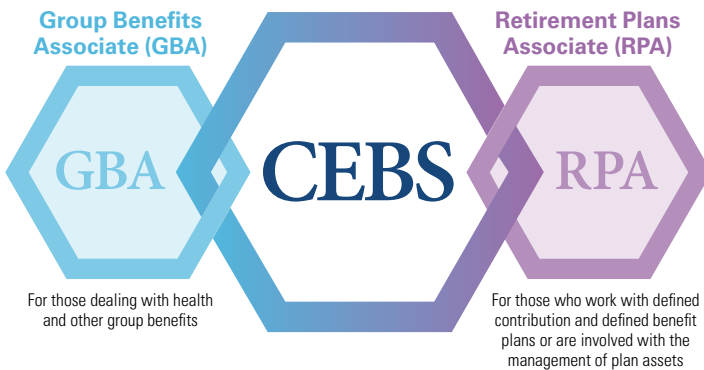
Employee Benefits Designations

Get Your CEBS, GBA or RPA!

The Certified Employee Benefit Specialist® (CEBS®) program provides the specialized knowledge, skills and confidence needed to meet the challenges of the profession. CEBS serves as a great next step on your employee benefits education path!

Courses

You will need to successfully complete all five courses to earn your CEBS designation. You can also earn your Group Benefits Associate (GBA) or Retirement Plans Associate (RPA) designation by completing three courses. Each course applies toward the CEBS designation.



How to Take a Course—Flexible, Accessible Study Options

The program is designed to flex to fit you. Study independently or enroll in an Online Study Group With Instructor Support for additional study support.



Register for Required Exam

Each course requires the successful completion of a comprehensive exam.



Order Study Materials

Exams cover content from the Study Guide and textbooks assigned to each course.



Self-Study and Consider Guided Support

Online Study Groups With Instructor Support provide access to instructors, a structured time frame and peer interaction.

REGISTRATION FOR IN-PERSON PROGRAMS INCLUDES

Continental breakfast • Lunches • Beverage breaks

REGISTRATION

Go to www.ifebp.org/benefitscourses to register.

CONTINUING EDUCATION CREDIT

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

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

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



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

POLICIES

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

GLOBAL BENEFITS ONLINE DISCUSSION GROUP

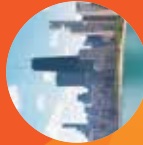
Connect with others who work with global benefits. A members-only discussion group, Global Benefits, is available in the Foundation Community. Share and learn with others who work in global benefits in this private, easy-to-use community forum. Find out more at www.ifebp.org/community.



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www.ifebp.org/benefitscourses.

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