EDUCATION POWERED BY PURPOSE

72nd ANNUAL

Employee Benefits Conference

October 25-28, 2026

New Orleans Ernest N. Morial Convention Center
New Orleans, Louisiana
Preconferences: October 23-25, 2026

Virtual Option Available



COMPLETE PROGRAM AGENDA

www.ifebp.org/usannual

International Foundation OF EMPLOYEE BENEFIT PLANS

72nd ANNUAL

Employee Benefits Conference

October 25-28, 2026
New Orleans, Louisiana



Education Powered by Purpose

Join 5,000+ industry leaders at the 72nd Annual Employee Benefits Conference. Gain the insights, tools and connections you need to drive meaningful change and make informed decisions in a rapidly evolving landscape. Don't miss this opportunity to stay ahead.

Hit the Right Note Through Education

Learn from top industry leaders who will tackle the latest trends and regulations, and bring what you learned back home to apply to your fund.

Fresh Perspectives Through Everyday Challenges

Build your conference schedule around the issues you've been facing, gaining fresh insights and solutions from every session.

Stay Compliant and Competitive

Understand the evolving regulatory environment and get expert advice on staying compliant while optimizing benefits for participants.

Connect With Peers

Network with fellow trustees, administrators and benefits professionals to exchange ideas, share experiences and build valuable relationships.

Discover Cutting-Edge Tools

Learn about the latest innovations, technologies and resources available to enhance plan management and participant engagement.

CAN'T ATTEND IN NEW ORLEANS ?

Virtual Option Available

Joining from anywhere is easy—Over 30 sessions will be presented online, allowing attendees the flexibility of viewing each session live or on demand through Monday, November 30, 2026.

Building Your Case for Attending

Education in uncertain and changing times is vital to making smart decisions for your fund. The Annual Conference is like no other—centered on education and your fiduciary duty. Here are five discussion points to help you justify your participation or the participation of your trustees in this time-honored event.

1
Three Days of Vendor-Free Education

Join your peers for three full days of learning with over 130 sessions from over 200 experts. With ten content-focused tracks and education for all levels, sessions contain valuable information without the sales pitches. Easily pick the sessions you need to create a custom conference experience, and gain key takeaways and action items you can implement immediately.

2
Certificate of Attendance Is Available

Validate your participation by earning a Certificate of Attendance. You must attend 11 sessions to receive this electronic certificate.

3
Great Investment

Those in attendance walk away with access to all conference session presentations and takeaways for six months, as well as access to the virtual environment for 30 days.

4
Build Strong Connections

Attending the Annual Conference provides you with more than just the vital information you need. Registration includes opportunities to meet your peers from around the country during lunch, morning refreshment breaks and shuttle bus rides each day.

5
More Than Just Information

Attendees will gain access to four world-renowned keynote presenters and an exhibit hall full of service providers who have the answers you are looking for.

We've got you covered if you need to provide justification to attend. Visit www.ifebp.org/USAnnualAdvantages for guidance on how to have the justification conversations before you register!

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Conference Schedule

Friday, October 23

Registration Open . . . . . 7:00 a.m.-5:00 p.m. CDT
New Trustees Institute—Level I: Core Concepts . . . . . 8:00 a.m.-5:00 p.m. CDT

Saturday, October 24

Registration Open . . . . . 7:00 a.m.-5:00 p.m. CDT
Preconference Programs . . . . 8:00 a.m.-5:00 p.m. CDT
Hospitality Hub Open . . . . . 12:00 noon-4:00 p.m. CDT

Sunday, October 25

Registration Open . . . . . 7:00 a.m.-5:00 p.m. CDT
Preconference Programs . . . . 8:00 a.m.-4:00 p.m. CDT
Hospitality Hub Open . . . . . 12:00 noon-4:00 p.m. CDT
Exhibit Hall Open* . . . . . 12:00 noon-4:30 p.m. CDT
Opening Session* . . . . . 4:30-6:00 p.m. CDT
Welcome Reception in Exhibit Hall* . . . . . 6:00-7:00 p.m. CDT

All breakout sessions are 60 minutes in length and have 30-minute breaks in between.

Monday, October 26

Registration Open . . . . . 6:30 a.m.-4:00 p.m. CDT
Opening Session . . . . . 7:30-8:45 a.m. CDT
Hospitality Hub Open . . . . . 8:45 a.m.-4:00 p.m. CDT
Breakout Sessions . . . . . 9:15 a.m.-3:45 p.m. CDT
Exhibit Hall Open . . . . . 10:00 a.m.-3:00 p.m. CDT
Lunch in Exhibit Hall . . . . . 11:45 a.m.-1:15 p.m. CDT

Tuesday, October 27

Registration Open . . . . . 6:30 a.m.-4:00 p.m. CDT
Opening Session . . . . . 7:30-8:45 a.m. CDT
Hospitality Hub Open . . . . . 8:45 a.m.-4:00 p.m. CDT
Breakout Sessions . . . . . 9:15 a.m.-3:45 p.m. CDT
Exhibit Hall Open . . . . . 10:00 a.m.-3:00 p.m. CDT
Lunch in Exhibit Hall . . . . . 11:45 a.m.-1:15 p.m. CDT

Wednesday, October 28

Registration Open . . . . . 6:30-11:00 a.m. CDT
Hospitality Hub Open . . . . . 7:00-10:30 a.m. CDT
Breakout Sessions . . . . . 7:30-10:00 a.m. CDT
Finale Session* . . . . . 10:30-11:30 a.m. CDT

**Guests are welcome to attend.*
Note: Exhibit hall is open to guests on Sunday only.
All times are subject to change.

Securing a Certificate of Attendance



To qualify for a Certificate of Attendance for the Annual Conference, each attendee must complete at least **11 sessions**. Those registered for the in-person program must complete all required sessions in person, and those registered for the virtual program must complete all sessions virtually. For in-person attendees of the main conference, it is the responsibility of the attendees to ensure their name badge is scanned when leaving each attended session.

Note: To qualify for a Certificate of Attendance for qualifying preconferences, each attendee is responsible for making sure their badge is scanned in and out of the session for the required timeframes.

Earning Continuing Education Credit

Attending sessions at the Annual Conference in New Orleans can offer continuing education (CE) credit hours for numerous designations and licenses. The International Foundation seeks approval based on requests received on conference registration forms at least 90 days in advance. The badge scanning described above does not qualify for CE purposes. Visit **www.ifebp.org/annualce** to learn more. CE credit will **ONLY** be available for those attending in person and will not be available with the virtual conference option. CE certificates will be mailed six weeks after the conclusion of the conference.

Conference Snapshot

The Annual Employee Benefits Conference is an event like no other. Whether you're a first-time attendee or have been participating for years, be sure to get the most out of your time at the conference.

130+
SESSIONS TO CHOOSE FROM

14
TIMEFRAMES

10
TOPIC TRACKS

11
completed sessions earns your certificate of attendance.

SESSION SELECTION DUE
AUGUST 3, 2026
Create your schedule to be entered to win.

Check in at the kiosk to receive your badge.

Ensure your badge is scanned after each session to receive your certificate of attendance.

Fill out and turn in Continuing Education forms to receive Continuing Education credit.

Check in at the Continuing Education desk to receive your forms.

Download the conference app.

200+
EXHIBITORS

Register for next year on site.

Bring your registration and full payment to the 2027 Registration Counter located in the Main Lobby. See the conference schedule for hours.

Find the Sessions You Need

Content Levels

Sessions are developed for participants at a variety of experience levels and are identified as all, basic or advanced.

All

These sessions are applicable to trustees, administrators and fiduciaries at all levels or experience.

Basic

Basic sessions are intended for trustees and administrators just starting in the role or who have never attended an International Foundation conference.

Advanced

Advanced sessions are for experienced trustees, administrators, consultants, managers and those involved in the overall management of benefit trust funds.



Session Recommendations for New Trustees and Public Plans

As you page through this agenda, look for the symbols below. They represent sessions that are the best fit for you.

Recommended for New Trustees

Recommended for Public Plans

Tracks

Sessions are divided into tracks to help you find the sessions that fit your needs. Tracks are color coded in the schedule, and a breakdown of the sessions in each track can be found on pages 16-36.

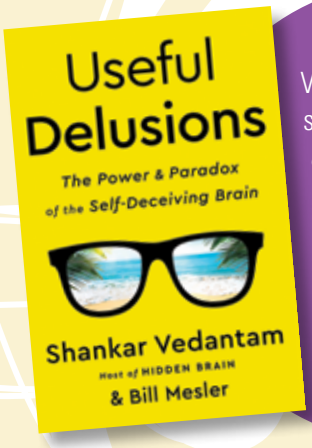
- Administration
- Fiduciary Responsibility
- General Topics
- Health and Welfare
- Investments
- Pension and Retirement
- Fund Professionals—Accountants
- Fund Advisors—Attorneys
- Public Plans
- Apprenticeship, Training and Education

Opening Keynote Session

The Challenge of Change

Sunday, October 25, 2026
4:30-6:00 p.m.

The central challenge for all organizations is adaptation. How do you build a new plane while flying the old one? How do you bring your people along when the path is difficult, uncertain and risky? This talk explores the hidden psychological barriers that make organizational change difficult, then offers specific and actionable ideas (including one "ninja" technique) to bring about real change.



Vedantam will be signing his book, *Useful Delusions: The Power and Paradox of the Self-Deceiving Brain*, immediately following the opening keynote session.



SHANKAR VEDANTAM

Shankar Vedantam is the host and executive editor of NPR's *Hidden Brain* podcast and radio show. With millions of downloads per week, *Hidden Brain* is regularly listed as one of the top 20 podcasts in the world.

As a former long-time, award-winning reporter for the Department of Human Behavior column for *The Washington Post* and two-time author, Vedantam knows how to translate complex human behavior into valuable, real-world insights.

Register now at www.ifebp.org/usannual and learn how to bring real change to your organization this October.

Keynote Speakers



Seth Mattison
Future of Work Strategist
Founder/CEO
FutureSight Labs

MONDAY'S KEYNOTE SESSION

The Human Advantage

October 26, 2026 | 7:30-8:45 a.m.

In this powerful and provocative program, Seth Mattison brings together his signature ideas, The Human Advantage and The Human Moat, to help leaders and teams get clear on where they create real value in a world shaped by AI.

As speed, knowledge and execution become easier to access, the edge moves somewhere else. Not in doing more, but in how you think, how you decide and how you show up when it matters.

This experience invites people to take a hard look at the way they are working and leading today, and to step into a different standard. One where agency matters; where alignment is real; and where the human elements that can't be automated become the foundation for how you lead, perform and move forward.



Rana Foroohar
Global Business Columnist,
Associate Editor
Financial Times
Global Economic Analyst
CNN

TUESDAY'S KEYNOTE SESSION

Economic Outlook

October 27, 2026 | 7:30-8:45 a.m.

Markets are at record highs, yet there are many risks on the horizon, from a massive run-up in public and private debt to the specter of inflation, bond market crisis and dedollarization. How does our current political and economic moment compare to other periods of history, such as the 1920s, 1970s or 2000s? How is it different? And what's really driving the markets today? While headlines are all about politics, there are deeper economic currents that businesspeople need to understand to navigate the next decade. Foroohar lays out the key issues that leaders need to consider, from the impact of AI and technological disruption to the end of cheap capital and regionalization of trade routes, as well as the emergence of a new currency order.



Sekou Andrews
Poetic Voice
CEO/Founder
SekouWorld, Inc.

WEDNESDAY'S KEYNOTE SESSION

The Audacity of "What If?"

October 28, 2026 | 10:30-11:30 a.m.

"What if there is a better way?" As the innovator of an audacious new category of public speaking that brought poetry to industry in unprecedented ways, Sekou has mastered the art of audacity. His 20-year career helping global brands humanize messaging began with two words: "What if?" What if we could define business our own way? What if our way could set the standard for our industry?

This inspiring and interactive speech will help you ignite that same audacity needed for you to defy convention, deny limitations and define yourselves for yourselves. It focuses on redefining the word "touch" as a metaphor for how leaders and brands can impact communities in increasingly purposeful ways. Prepare to engage your imagination and learn new strategies to help your business get in TOUCH with its humanity.

Recommended Preconferences

Arrive early and extend your learning by attending a preconference.

TAFT-HARTLEY TRUSTEES

Ahead of the conference, enhance your understanding of your fiduciary role, regardless of your experience level.

RECOMMENDED PRECONFERENCES:

- New Trustees Institute—Level I: Core Concepts (for newer trustees)
- Trustees Institute—Level II: Concepts in Practice (for trustees with three years of experience who have completed Level I)
- Trustees Masters Program (TMP) (for trustees with five years of experience who have completed Level I and Level II)
- TMP Advanced Leadership Summit (must be a TMP graduate)

PUBLIC SECTOR TRUSTEES AND SUPPORT STAFF

Learn how to accommodate the nuances associated with public sector pension and health and welfare funds.

RECOMMENDED PRECONFERENCES:

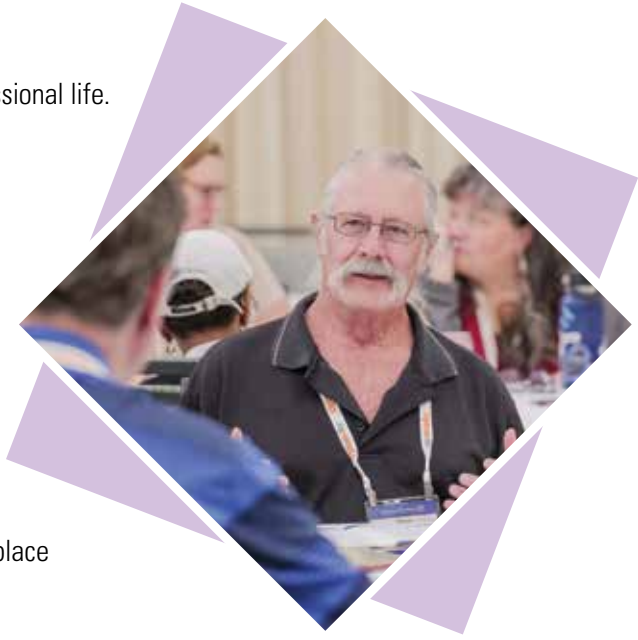
- Introduction to Public Sector Benefits Administration
- Public Plan Trustees Institute—Level I
- Public Plan Trustees Institute—Level II
- Trustees Masters Program (TMP) (for trustees with five years of experience who have completed Level I and Level II)
- TMP Advanced Leadership Summit (must be a TMP graduate)

EVERYONE

Examine topics that will enhance both your personal and professional life.

RECOMMENDED PRECONFERENCES:

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



Preconference Options

Arrive early and extend your learning by attending a preconference.

2½-Day Course

New Trustees Institute—Level I: Core Concepts

STARTS FRIDAY!

For Newer Trustees

Friday, October 23 | 8:00 a.m.-5:00 p.m. CDT
Saturday, October 24 | 8:00 a.m.-5:00 p.m. CDT
Sunday, October 25 | 8:00 a.m.-12:00 noon CDT

Please note for travel: This course starts on Friday, October 23 for the 2026 program. This makes it easier to attend the main Annual Employee Benefits Conference. Plan accordingly to ensure you meet all attendance requirements for your certificate.

REGISTRATION CODE: 26N8

This foundational curriculum will provide you with an understanding of your role; your responsibility as a fiduciary; and an overview of the technical aspects of serving as a trustee on a health, retirement or other ERISA plan. Learn best practices, legal requirements and the current issues that the benefits industry faces.

Two-Day Course

Trustees Institute—Level II: Concepts in Practice

For Trustees With Three Years of Experience Who Have Completed Level I

Saturday, October 24 | 8:00 a.m.-5:00 p.m. CDT
Sunday, October 25 | 8:00 a.m.-4:00 p.m. CDT

Note: Registration is limited and fills up quickly; register early.

REGISTRATION CODE: 26N9

Build on your knowledge of being a multiemployer trustee by attending the Trustees Institute—Level II: Concepts in Practice. This institute is for trustees with three or more years of experience, expanding on the concepts provided at the New Trustees Institute—Level I: Core Concepts. Discover best practices, identify possible solutions and recognize critical issues by attending this interactive program.

Two-Day Course

Trustees Masters Program (TMP)

For Trustees With Five Years of Experience Who Have Completed Level I and Level II

Saturday, October 24 and Sunday, October 25 | 8:00 a.m.-4:00 p.m. CDT

REGISTRATION CODE: 26D2

The Trustees Masters Program (TMP) is for trustees who want to think and act more boldly, systematically and proactively. The curriculum builds on trustees' existing knowledge base and experience through peer exchange, group exercises and engagement with subject matter experts. The program has two tiers to further facilitate your ongoing education and recognition. Tier one (Saturday and Sunday) is required to receive the Certificate of Achievement. Those who also attend the tier two designated TMP Candidate Classes during the conference will receive their TMP pin. See page 17 for qualifying sessions.

If you have already completed the program, consider the TMP Advanced Leadership Summit on Sunday, October 25.

One-Day Course

TMP Advanced Leadership Summit

For TMP Graduates Only

Sunday, October 25 | 8:00 a.m.-3:30 p.m. CDT

REGISTRATION CODE: 26D3

The TMP Advanced Leadership Summit is an exclusive program for trustees who have earned the TMP Certificate of Attendance and commemorative pin. The Summit offers an opportunity to further examine 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 focus of the TMP Advanced Leadership Summit changes each year to reflect the most essential issues facing trustees today. Attendees of the Summit will earn two sessions toward the main conference Certificate of Attendance.

Preconference Options

Two-Day Course

Public Plan Trustees Institute—Level I

NEW!

Saturday, October 24 | 7:30 a.m.-4:00 p.m. CDT
Sunday, October 25 | 7:30 a.m.-4:00 p.m. CDT

REGISTRATION CODE: 26PP1C

This course will take a deep dive into fiduciary responsibility and plan governance, retirement plans, health plans and the legal environment. Each section will be led by industry experts, ready to help you apply the concepts you will learn to your real-world challenges and bring the value back to your organization.

Two-Day Course

Public Plan Trustees Institute—Level II

NEW!

Saturday, October 24 | 7:30 a.m.-4:00 p.m. CDT
Sunday, October 25 | 7:30 a.m.-4:00 p.m. CDT

REGISTRATION CODE: 26PP2C

Level II of this program builds on Level I, taking a deep dive into public plan governance and emerging issues, investing public plan assets, trustee board strategies, and plan administration and communication concepts. Each section will be led by industry experts, ready to help you apply the concepts learned to real-world challenges and find clear takeaways you can implement within your organization.

Two-Day Course

Introduction to Public Sector Benefits Administration

Saturday, October 24 | 8:00 a.m.-5:00 p.m. CDT
Sunday, October 25 | 8:00 a.m.-3:00 p.m. CDT

REGISTRATION CODE: 26P6

The public sector has unique characteristics that impact how employee benefits are managed. Staff and plan fiduciaries who manage these benefit plans need to understand the financing, politics, and legal and regulatory environments in which they operate. This course covers the core principles of employee benefit plans covering public sector workers. Take a deep dive into the structure of government financing, technology, the legal and regulatory environment, and more. Gather with your peers and experts in the field for two days of learning and networking. The course will end with a case study designed to help you bring action items back to your organization with a clear path to better plans.

FINANCIAL PLANNING WORKSHOP

Two-Day Workshop

Health, Wealth and Happiness—Planning Your Path to a Successful Retirement

Saturday, October 24 and Sunday, October 25 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: Attendee only PC53
Attendee plus spouse/guest PC55

Securing a healthy and successful retirement requires a holistic approach that goes beyond just having enough money. This workshop will explore tools and resources to design the "life" side of your next chapter and to boost and protect your retirement income. Attendees of all ages are encouraged to participate.

Spouses/guests may also attend this workshop at a reduced price!
Use the attendee plus spouse/guest option when registering.

One-Day Workshops—Attend One or Both Days!

Enrichment workshops are $560 per day through September 13, 2026 and $710 per day after September 14 for members.

Mental Health First Aid® at Work

Saturday, October 24 or Sunday, October 25 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE FOR SATURDAY: PC01

REGISTRATION CODE FOR SUNDAY: PC02

By fostering a culture of mental well-being and compassion, the Mental Health First Aid (MHFA) at Work Certification makes your organization a healthier place to work. You will come away with a better understanding of how to care for your well-being at work as well as an MHFA Action Plan (ALGEE) to apply to noncrisis and crisis scenarios. During this four-hour, instructor-led course, you will practice the skills needed to recognize and respond to a co-worker who may be experiencing a noncrisis or crisis mental health or substance use challenge—and connect them with the appropriate resources in accordance with company policies. Attendees will receive a MHFA at Work Certification after completing the instructor-led portion of the training, postwork and postevaluation.

Learning objectives include the following.

- Describe the purpose of Mental Health First Aid and the role of the Mental Health First Aider.
- Explain the five steps of the MHFA Action Plan (ALGEE).
- Determine the actions that a Mental Health First Aider should take for noncrisis situations in the workplace.
- Discover the actions that a Mental Health First Aider should take for potential crisis and immediate crisis situations in the workplace.
- Practice the MHFA Action Plan (ALGEE) in noncrisis and crisis scenarios in which a co-worker is experiencing a mental health or substance use challenge.

Register early—Seating is limited to 30 attendees per day.

Cybersecurity and Social Engineering Fraud

Saturday, October 24 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC03

Fraud can happen at any time, in any place. You are responsible for having the tools necessary to prevent cyberattacks, data breaches and claims fraud. Join this one-day preconference to learn how to spot social engineering fraud, learn about tools and tests to be implemented to avoid fraud, review and implement the right insurance coverage, and more!



One-Day Workshops—Attend One or Both Days!

Understanding and Using the 7 Benchmarks for a Well Workplace

Saturday, October 24 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC05

Through this workshop, you'll be introduced to the Wellness Alliance's 7 Benchmarks: A Framework for a Well Workplace, a foundation for building and sustaining a results-oriented workplace wellness strategy. By using this information in your organization, you can provide a credible framework that can be tailored toward organization-specific values, missions, visions and goals for wellness. Organizations that are dedicated to their workers' health are given a structure to guide them through the Well Workplace Process.

You've Been Summoned—Best Practice in Litigation, Depositions and Trial Testimony

Saturday, October 24 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC07

Plan trustees, professionals, administrators and staff are often involved in plan litigation with little to no experience in these legal settings. This can stem from a variety of issues including collections, contract issues, plan design disputes and so on. Join this workshop to better understand how to prevent litigation when you can and prepare for it when it happens.

Trustee and Administrator Succession Planning

Saturday, October 24 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC09

Building and maintaining a positive board culture takes intention and effort. This process can be more challenging when faced with board turnover, especially if it is unexpected. In this workshop, you will learn a step-by-step approach to succession planning, including how to find new trustees and plan for administrator changes. You will learn:

- How to amend trust agreements and/or collective agreements to support succession planning for trustees and administrators
- How to address bias and culture on existing boards
- How to onboard new trustees and administrators.



One-Day Workshops—Attend One or Both Days!



Benefit Plan Mergers Workshop

Sunday, October 25 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC04

In recent years, the notion of Taft-Hartley plan mergers has gained momentum. Plan trustees, advisors and professionals are weighing the pros and cons of plan mergers to determine the best path forward. This interactive, four-hour session will include scenario-planning exercises and will answer key questions, including:

- What are some of the most commonly faced issues in administrative, implementation and compliance practices? What other pitfalls should be avoided?
- What governance practices must be established before exploration?
- What are the best practices in implementation?

Understanding and Engaging Today's Workforce

Sunday, October 25 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC06

Something has changed out there! You feel it wherever you go. Every business is short-staffed. People are less patient. Having a mediocre customer service experience is the best you can hope for. Is it really true that nobody wants to work or go into the office? We are clearly dealing with a different world as it relates to work—our own work and the work of others who we rely on. This workshop will examine the changing workforce and help you understand how to evaluate and implement positive change in your own work environment. Topics include:

- Demographics of today's workforce
- Changing norms, expectations and desires
- Creating positive culture in the office and on the jobsite
- Building a strategy for change.

Attorneys Only—Ethics and Diversity in Employee Benefits

Sunday, October 25 | 8:00 a.m.-1:00 p.m. CDT

REGISTRATION CODE: PC44

Join us for four hours of continuing legal education credits in Ethics or Diversity and Inclusion and Elimination of Bias training for benefit attorneys. This critical education will cover representation matters, contracts and relationships, disclosures and DEI litigation. Be sure to include your CLE request on the registration form with your state and BAR license number.

Administration

A01 Positioning Your Benefit Plans in a Competitive Labor Market

Monday, October 26 **1:15-2:15 p.m.**

This session will review how to strategically keep the plan well-funded while asking whether the benefits you are offering are competitive in the job market.

- Evaluating and benchmarking benefits in the job market
- Making benefit plan improvements and managing costs
- Navigating labor-management concerns

A02 Creating a Multiemployer Fund Office Compliance Calendar

Monday, October 26 **10:45-11:45 a.m.**

With so many new reporting requirements, it has become increasingly difficult for fund offices to manage their timelines.

- What is due and when?
- What if your plan year is not the calendar year?
- Communication strategies

A03 Merging Benefit Plans—Administrator's Perspectives

Monday, October 26 **9:15-10:15 a.m.**

- Facilitation roles
- Preparation
- Professionals' involvement
- Timeline
- Communications
- Policies and plan documents

A04 Merging Benefit Plans—Navigating Culture Change

Monday, October 26 **2:45-3:45 p.m.**

In this session, we will look at how to support participants and staff through a merger.

- Challenges to anticipate
- Merging cultures
- Communication
- Best practices for a smooth transition

A05 Policies and Plan Documents

1 Tuesday, October 27 **9:15-10:15 a.m.**
2 Wednesday, October 28 **9:00-10:00 a.m.**

Attend this session for an overview of many key policies and documents to consider for plan administration, such as:

- Education policies
- Trustee expense and reimbursement policies
- Delinquent and collection policies
- AI policies (staff, trustees, etc.)
- Document retention policies (physical and electronic)
- HIPAA and PII policies
- Plan documents, summary plan descriptions, SMMs and SBCs.

A06 Administrator's Oversight—Software System Implementation

Tuesday, October 27 **1:15-2:15 p.m.**

This session will feature a facilitated discussion on best practices, lessons learned from software system implementations, outstanding issues and future opportunities.

A07 Addressing Industry Challenges: Sharing Accounting and Auditing Best Practices in the Fund Office

Tuesday, October 27 **2:45-3:45 p.m.**

- Internal controls
- Large office vs. small office
- Responsibilities—Administrator and the auditor
- Competing priorities
- Policies and procedures

A08 Administrator-Only Roundtables: Building Community

Wednesday, October 28 **7:30-8:30 a.m.**

This session is for administrators to have open discussions on hot topics and trends in benefits administration. These will include best practices, innovations, roadblocks and solutions as discussed by each table. Please arrive early to secure your spot in the session!

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Fiduciary Responsibility

F01 You Are a Fiduciary—Now What?

1	**Monday, October 26**	**9:15-10:15 a.m.**
2	**Tuesday, October 27**	**10:45-11:45 a.m.**

- Understanding your obligations regarding:
  —Financial oversight and benefit payments
  —Collections of contributions and withdrawal liability
  —Securing data and privacy.
- Trust fund business vs. other business
- Familiarity with fund policies and procedures
- Duties/activities that can be delegated

F02 Best Practices in Trustee Processes and Oversight

1	**Monday, October 26**	**10:45-11:45 a.m.**
2	**Tuesday, October 27**	**9:15-10:15 a.m.**

- Evolving fiduciary responsibilities
- Disclosures, conflicts of interest and parties in interest
- Areas vulnerable to breaches in fiduciary responsibility
- Oversight of professionals, investments and fees

F03-TMPC1 Understanding the Fiduciary Duty of Appointing a Multiemployer Trustee

1	**Monday, October 26**	**1:15-2:15 p.m.**
2	**Tuesday, October 27**	**1:15-2:15 p.m.**

- How are trustees appointed, and who has the authority to appoint?
- Understanding your fiduciary responsibility and duty to monitor your trustees
- Strategies for recruiting trustees
- Institutional knowledge and continuity
- Succession planning
- Professional trustees

This session is one of two required sessions TMP candidates must attend to receive their pin.

F04-TMPC2 Wearing the Right Hat at the Right Time—The Two-Hat Dilemma

1	**Monday, October 26**	**1:15-2:15 p.m.**
2	**Tuesday, October 27**	**2:45-3:45 p.m.**

This session will examine real-life scenarios that demonstrate the fine line between outside interests and the interests of the participants.

- Difficult and uncomfortable decisions
- Understanding your co-fiduciary responsibility
- Tools and processes for effective decision-making
- Appropriate documentation and due diligence

This session is one of two required sessions TMP candidates must attend to receive their pin.

F05 Trustee Expenses

1	**Tuesday, October 27**	**9:15-10:15 a.m.**
2	**Wednesday, October 28**	**7:30-8:30 a.m.**

- Plan-related expenses vs. other expenses
- Areas of potential concern
- Documentation and policies
- How good people can make poor choices
- Training your new trustees
- Areas drawing DOL attention

F06 Best Practices in Selecting Fund Professionals

1	**Tuesday, October 27**	**10:45-11:45 a.m.**
2	**Wednesday, October 28**	**9:00-10:00 a.m.**

- Performance metrics and standards (including performance penalties)
- Fees and reporting, including §408(b)2(B)
- RFPs and RFIs
- Vendor cybersecurity best practices and questionnaire responses
- Reviewing service provider succession plans
- Understanding the trustee's fiduciary responsibility of selecting the fund professionals

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Fiduciary Responsibility

F07 Important Tools for Monitoring Compliance

NT

1	**Tuesday, October 27**	**1:15-2:15 p.m.**
2	**Wednesday, October 28**	**7:30-8:30 a.m.**

- Big data and data analytics
- What your vendors bring to the table
- Audits—Dependents, death, cyber and compliance
- Policies and procedures
- Contract language

F08 Understanding and Monitoring Your Financial Statements

P NT

1	**Tuesday, October 27**	**2:45-3:45 p.m.**
2	**Wednesday, October 28**	**9:00-10:00 a.m.**

- How to read the plan's financial statements and tax returns
- Ratios and reserves
- Creating and following a budget for the plan/trust
- Internal financial statements vs. external
- Trustee roles and responsibilities

F09 Insurance for Plans and Trustees

NT

1	**Monday, October 26**	**9:15-10:15 a.m.**
2	**Tuesday, October 27**	**10:45-11:45 a.m.**

- Overview of fiduciary liability and other insurance, including cyber
- Do you have enough coverage?
- Understanding the timing for claims
- Benefit overpayment protection
- What other benefits does your policy offer?

F10 Cybersecurity—It's Okay to Spend Money to Protect Member Data

NT

1	**Monday, October 26**	**10:45-11:45 a.m.**
2	**Tuesday, October 27**	**1:15-2:15 p.m.**

- Funds need independent review of:
  —Email policies and usage (staff, trustees, employers)
  —Security (hardware, software, etc.)
  —Connections to other data sources (e.g., recordkeepers).
- How to review vendors for security audits and services
- No fund is too small for security improvements.

F11 Understanding the Use of "Professional" Trustee

Monday, October 26 **2:45-3:45 p.m.**

This session is designed to provide trustees with information on why some funds may use a "professional" trustee to fill vacancies.

- What are "professional" trustees and "independent" fiduciaries?
- Reasons a fund seeks a "professional" trustee
- What does the appointing entity hope to accomplish?
- Other concerns and considerations

F12 Fiduciary Responsibilities in a Defined Contribution Plan

NT

1	**Monday, October 26**	**2:45-3:45 p.m.**
2	**Tuesday, October 27**	**1:15-2:15 p.m.**

- Timely transfer of worker contributions (wage deferrals) and employer contributions to the recordkeeper
- Choosing and monitoring investment options
- Understanding the various share classes and fees
- Participant loans and hardships
- Monitoring administrative reserves and forfeitures

Register at www.ifebp.org/usannual by September 14 to save and secure your hotel.

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

General

G01 U.S. Legislative Update

Monday, October 26 **9:15-10:15 a.m.**

This session provides an informative and comprehensive analysis of recent, pending or upcoming legislation activities that will continue to shape your plan decisions.

G02 U.S. Regulatory Update

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **10:45-11:45 a.m.**

Join this session to hear the latest trends and hot topics in employee benefit plan regulation.

G03 Updates in Benefits Litigation

Monday, October 26 **2:45-3:45 p.m.**

Attend this session to learn about updates in litigation and fiduciary responsibility for employee benefit plans. The speaker will cover a range of new and/or updated cases within the federal court system.

G04 What Is Wellness?

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **9:15-10:15 a.m.**

- Mental health initiatives
- Inclusion considerations
- Financial wellness

G05 Understanding the 7 Benchmarks for a Well Workplace

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **10:45-11:45 a.m.**

Attend this session to get an introduction to the 7 Benchmarks for a Well Workplace, which is a framework that can be tailored toward organization-specific values, mission and goals for wellness.

G06 Addressing Violence On and Off the Jobsite

1 Monday, October 26 **1:15-2:15 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- Understanding causes of bullying and violence
- Recognizing and responding to abuse
- How to intervene, mitigate and de-escalate
- Training programs and tools

G07 Rising to the Challenge: Communications in Difficult Situations

1 Monday, October 26 **9:15-10:15 a.m.**
2 Tuesday, October 27 **10:45-11:45 a.m.**

- Raising difficult issues
- Conflict resolution
- Handling difficult and disputed decisions
- Creating trust through conflict

G08 Providing Preretirement Support to Your Members

1 Monday, October 26 **1:15-2:15 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

This session will share guidance and tools for you to help your members transition into retirement.

- Retirement readiness: Financial and emotional support
- How to explain different retirement plan structures and benefit options
- Health care options
- Activities beyond the workplace

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

General

G09 Defining Success Across Benefit Funds

Monday, October 26 **2:45-3:45 p.m.**

This session challenges trustees to look beyond budgets and compliance and ask more foundational questions: What does success look like for members, for the fund and for the board itself? What do you measure and why?

- Member experience and understanding
- Health, retirement and workforce outcomes
- Financial sustainability and risk management
- Operational effectiveness and trust in governance

G10 Conducting Effective Board Meetings—Part I

1 Monday, October 26 **1:15-2:15 p.m.**
2 Tuesday, October 27 **1:15-2:15 p.m.**

- What does an effective meeting look like?
- *Robert's Rules of Order*
- Using a parliamentarian
- Preparing for a board meeting
- Creating an effective agenda

G11 Conducting Effective Board Meetings—Part II

1 Monday, October 26 **2:45-3:45 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- Pros and cons of virtual vs. in-person meetings
- Preparing with plan professionals
- Meeting minutes
- Following up after the meeting

G12 Evaluating Your Payroll Auditing Program

1 Tuesday, October 27 **10:45-11:45 a.m.**
2 Wednesday, October 28 **9:00-10:00 a.m.**

- Roles and responsibilities
- How to evaluate payroll audit programs
- Collection and payroll audit policies
- Cycles and alternate employer selections
- Steps to expedite collections

G13 Artificial Intelligence Uses in the Fund Office

1 Tuesday, October 27 **1:15-2:15 p.m.**
2 Wednesday, October 28 **7:30-8:30 a.m.**

Artificial intelligence is increasingly being evaluated by benefits organizations as a tool to support benefits administration. This session focuses on how AI is being applied in practical, measured ways within benefit plans, with an emphasis on practical use cases rather than future promises.

- Operational tasks
- Governance, risk and oversight considerations
- Current capabilities, limitations and appropriate use

G14 Cybersecurity Update

1 Tuesday, October 27 **9:15-10:15 a.m.**
2 Wednesday, October 28 **9:00-10:00 a.m.**

- The importance of investing in cybersecurity
- How does the use of AI enhance or add risk?
- Utilizing DOL and HHS guidance
- Best practices—What are your first steps after a breach?

G15 Project Management: Essential Skills for the Fund Office

1 Monday, October 26 **9:15-10:15 a.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

This session is designed to explore the core project management principles, including:

- Project scope
- Timeline
- Resources
- Communication
- Deliverables
- Differentiation between job management and project management.

Program Content All Basic Advanced

Recommended for New Trustees

Recommended for Public Plans

General

G16 Paid Leave in the Workplace

1 Tuesday, October 27 1:15-2:15 p.m.
2 Wednesday, October 28 9:00-10:00 a.m.

Paid leave covers everything from vacation and sick pay to bereavement and emergency leave.

- Strategies for compliance with federal, state and local laws
- Implementation of new programs
- Best practices

G17 Communicating With Plan Participants—Case Study Examples of Success

1 Monday, October 26 2:45-3:45 p.m.
2 Wednesday, October 28 7:30-8:30 a.m.

- Bridging language barriers
- Driving utilization of existing offerings
- Being creative while fulfilling legal obligations

G18 Understanding Prohibited Transactions

1 Monday, October 26 1:15-2:15 p.m.
2 Tuesday, October 27 9:15-10:15 a.m.

- What is a prohibited transaction?
- Who are parties-in-interest?
- What penalties can be imposed?
- Are there any exceptions to the prohibited transaction rules?

G19 Fiduciary Education, International Foundation Member Benefits and Getting Involved

Tuesday, October 27 2:45-3:45 p.m.

Attend this session to learn more about the importance of fiduciary education for trustees and administrators of employee benefit plans and how International Foundation programs and resources can support your educational path.

- Fiduciary education: Who needs it and why?
- Educational paths
- International Foundation member benefits

G20 You Attended the U.S. Annual Conference—Now What?

Wednesday, October 28 7:30-8:30 a.m.

- Communicating key takeaways and actions at your next meeting
- Tips for implementing new initiatives
- Making the case for ongoing education



Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Health and Welfare

H01 Health Care Track Kickoff

Monday, October 26 **9:15-10:15 a.m.**

Learn about the sessions in the health care track of the U.S. Annual Conference. Identify the cost drivers that are most impacting your plan and use this knowledge to decide which sessions of the conference to attend.

H02 Health Care Legal and Legislative Update

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **1:15-2:15 p.m.**

Attend this session to learn about updates in the legislative and regulatory environment for health and welfare plans.

H03 DOL Audit Trends for Health Plans

1 Monday, October 26 **9:15-10:15 a.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- DOL oversight practices
- Recent enforcement overview
- Evaluating the investigation process
- Current enforcement trends

H04 Health Plans 101—Terminology for New Trustees

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- Identifying plan structures
- Identifying plan professionals
- Abbreviations, acronyms, slang and more
- Components of written policy language

H05 Prescription Drug Pipeline Update

1 Tuesday, October 27 **9:15-10:15 a.m.**
2 Wednesday, October 28 **9:00-10:00 a.m.**

- What's coming down the pipeline?
- Specialty drug update
- Cost-containment strategies
- Legal and legislative implications

H06 Improving Plan Outcomes Through Data

1 Monday, October 26 **2:45-3:45 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- The current state of plan metrics
- Requesting data from your professionals
- Finding data patterns among your membership
- Identifying action steps to improve outcomes

H07 GLP-1 Drugs—Part I: Coverage Considerations

1 Monday, October 26 **1:15-2:15 p.m.**
2 Tuesday, October 27 **1:15-2:15 p.m.**

- Industry update: Pipeline changes, impact of direct-to-consumer advertising, oral medications and more
- Balancing plan costs and outcomes
- Managing member expectations
- A view from the fund office

H08 GLP-1 Drugs—Part II: 2026 Data Insights

1 Monday, October 26 **2:45-3:45 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- GLP-1 survey data: Industry and plan-level insights
- Coverage for diabetes and weight loss
- Impact of cost-control mechanisms
- Using data to guide plan action

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Health and Welfare

H09 Using Artificial Intelligence to Manage Health Plan Operations

1 Tuesday, October 27 9:15-10:15 a.m.
2 Wednesday, October 28 7:30-8:30 a.m.

- Overview of emerging technologies
- Implementing practical applications: Member chatbots, data analysis and more
- Dos and don'ts in implementation
- The importance of an AI policy
- HIPAA considerations

H10 Mental Health Benefits—Accessing Necessary Resources

P

1 Tuesday, October 27 10:45-11:45 a.m.
2 Wednesday, October 28 9:00-10:00 a.m.

- Identifying causes, symptoms, risk factors and preventive steps
- Provider landscape update
- Overview of psychedelic offerings
- Plan design considerations
- Where your plan participants can access appropriate resources

H11 Substance Use Disorders—Best Practices for Prevention and Treatment

P

1 Tuesday, October 27 1:15-2:15 p.m.
2 Wednesday, October 28 7:30-8:30 a.m.

- Establishing the need—Safety, production, cost and more
- Plan design considerations
- Compliance considerations
- Best practices for program success

H12 The Affordable Care Act 2.0: The Grandfathered Status Decision

Monday, October 26 1:15-2:15 p.m.

- The Affordable Care Act (ACA)—Where are we now?
- Compliance requirements for maintaining grandfathered status
- Requirements for when you forgo your status
- Case study examples of approaches

H13 Navigating a Member Cancer Diagnosis

P

1 Monday, October 26 9:15-10:15 p.m.
2 Tuesday, October 27 10:45-11:45 a.m.

- Identifying member pain points: Prior authorization, medical necessity, exclusions and more
- Best practices in communication
- Mental health considerations
- Fulfilling your fiduciary obligations

H14 The Future of Precision Medicine

Monday, October 26 1:15-2:15 p.m.

P

- Pharmacogenetic industry update
- Genetic testing therapies
- The next horizon
- Evaluating plan impact
- Cost-containment considerations

H15 Health Plan Reserves—Where Should You Be?

P

1 Monday, October 26 2:45-3:45 p.m.
2 Tuesday, October 27 10:45-11:45 a.m.

- Determining your appropriate reserve level
- Factors to consider: Funded status, population characteristics and more
- Impact of plan investment metrics
- Creating and maintaining an effective plan reserve policy

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Health and Welfare

H16 Deciphering Your PBM Contract Language

P NT

1 **Monday, October 26** **9:15-10:15 a.m.**
2 **Tuesday, October 27** **2:45-3:45 p.m.**

- Identifying standard contract elements
- The impact of recent transparency initiatives
- Fulfilling your fiduciary duties

H17 Revisiting Your Dental Benefit Offerings

P

Monday, October 26 **1:15-2:15 p.m.**

- The link between oral health and other conditions
- Industry update: Changes to standards, technology, networks and more
- Ensuring your contracts are current and competitive
- RFI and RFP considerations

H18 Stop-Loss Insurance—Finding the Right Fit

P

1 **Monday, October 26** **10:45-11:45 a.m.**
2 **Tuesday, October 27** **9:15-10:15 a.m.**

- Stop-loss level-set: Definitions, plan types and industry characteristics
- Evaluating your plan population
- Selecting appropriate coverage levels
- Policy and pricing considerations

H19 Communicating the Value of Your Health Plan

P NT

Monday, October 26 **10:45-11:45 a.m.**

- Using your health benefits as a recruitment and retention tool
- Communicating the "true cost" of coverage to your participants
- Using education to guide participant decision making
- Real-world examples of success

H20 Site-of-Care Strategies—Optimizing Your Plan Delivery Models

Monday, October 26 **2:45-3:45 p.m.**

- Identifying and redirecting high-cost services: Imaging, infusions and surgeries
- Managing member needs and expectations
- Communication strategies
- Measuring plan impact

H21 The Current State of On- and Near-Site Clinics

1 **Monday, October 26** **1:15-2:15 p.m.**
2 **Tuesday, October 27** **10:45-11:45 a.m.**

- Determining fit with your current plan population
- Design considerations: Delivered services, models and more
- Measuring the success of your initiatives
- Case study examples

H22 Retiree Health Coverage—Options for Plan Participants

Monday, October 26 **2:45-3:45 p.m.**

- Evaluating the current coverage landscape
- Coverage for pre-Medicare retirees
- Future trends to consider

H23 Navigating the Point Solutions Landscape

P

Monday, October 26 **2:45-3:45 p.m.**

- Industry update—Untangling the web of offerings
- Impact of artificial intelligence
- Contracting considerations
- Best practices in the RFI and RFP processes
- Monitoring the effectiveness of your vendors

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Health and Welfare

H24 Best Practices in Direct Contracting

Monday, October 26 **1:15-2:15 p.m.**

- Understanding direct contracting concepts
- Pros and cons
- Market interest
- Case study examples of success

H25 Fraud Prevention Initiatives—Protecting Your Plan Assets

P NT

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **1:15-2:15 p.m.**

- The most common sources of health plan fraud
- New cybersecurity trends, including common threats, prevention steps and post-breach action steps
- Understanding your fiduciary obligations

H26 Providing Benefits From Fertility Through Menopause

P NT

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **9:15-10:15 a.m.**

Attend this session to hear options for offering women's health benefits from fertility to menopause.

- How to include these benefits in your plan or workplace
- Providing worker support
- Third-party vendors
- Examples of successful implementations



Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Investments

I01 Institutional Investing 101

Monday, October 26 **9:15-10:15 a.m.**

- Basics of stocks, bonds and interest rates
- Terms used in investments
- Separate accounts, commingled funds and mutual funds
- Cyclical nature of investments
- Historical views of portfolio design
- Why market timing doesn't work

I02 Investments: A Fiduciary Primer

1 Monday, October 26 **9:15-10:15 a.m.**
2 Tuesday, October 27 **10:45-11:45 a.m.**

- Understanding fiduciary duties under ERISA and trust law
- Defining the roles of trustees and investment professionals
- Reviewing core investment principles and asset classes
- Learning how to read performance reports
- Identifying key questions to ask advisors
- Strengthening oversight through policy and governance

I03 Investment Governance

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **1:15-2:15 p.m.**

- Roles and responsibilities of trustees
- Establishing an effective investment committee
- Traditional vs. OCIO arrangements
- Meetings that help manage the fast pace of markets
- Proxy voting

I04 Investing for Health and Welfare and Apprenticeship Plans

1 Monday, October 26 **10:45-11:45 a.m.**
2 Tuesday, October 27 **10:45-11:45 a.m.**

- Investing through the lens of a plan type
- Investment horizon
- Risk tolerance
- Reserves and cash flows

I05 Working With Your Investment Professionals

1 Monday, October 26 **1:15-2:15 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- Understanding investment consultants and managers and their roles
- Understanding fee arrangements and negotiations
- Ensuring that strategies align with your fund's goals
- Reading the reports from your consultant and fund managers
- Maximizing your advisory obligation while maintaining a strong relationship

I06 Total Plan and Investment Manager Benchmarking

1 Monday, October 26 **2:45-3:45 p.m.**
2 Tuesday, October 27 **2:45-3:45 p.m.**

- DOL audit perspective
- Proper benchmarking used by investment managers
- Total plan benchmarks
- Plan types: Defined benefit, defined contribution, health, apprenticeship

I07 Basics of Defined Contribution Plan Investments

1 Monday, October 26 **9:15-10:15 a.m.**
2 Tuesday, October 27 **9:15-10:15 a.m.**

- Participant vs. trustee directed
- What is a QDIA?
- Fees transparency: Custody, recordkeeping and investment
- Communicating fees
- Trustee responsibilities and risks

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Investments

I08 Evolution in Asset Allocations

1 **Monday, October 26** **1:15-2:15 p.m.**
2 **Tuesday, October 27** **1:15-2:15 p.m.**

- Terms used in investments
- How to approach asset allocation
- How much detail should your investment policy statement (IPS) have?
- Why is keeping your investments within the IPS guidelines so important?
- How to reconcile actuarial assumptions with investment return projections
- How should the macroeconomic outlook change my investing decisions?

I09 Alternative Investments 101

1 **Tuesday, October 27** **9:15-10:15 a.m.**
2 **Wednesday, October 28** **9:00-10:00 a.m.**

- Defining alternative investments and core strategies
- Understanding fee structures
- Evaluate liquidity constraints and capital calls
- Assess pacing, commitments and cash flow impact
- Diversification and risk strategies
- Questions to ask before investing

I10 All About Fees—Understanding the Costs of Investing

1 **Tuesday, October 27** **10:45-11:45 a.m.**
2 **Wednesday, October 28** **7:30-8:30 a.m.**

- Types of fees
- Benchmark fees against peers and market trends
- Review private market and OCIO fee arrangements
- Conducting regular fee reviews and negotiations

I11 The Impact of Artificial Intelligence on Investing—Hype or Market Shift?

1 **Tuesday, October 27** **9:15-10:15 a.m.**
2 **Wednesday, October 28** **9:00-10:00 a.m.**

- Understand how AI is shaping markets
- Explore impacts on productivity and labor markets
- Examine market concentration and mega cap dominance
- Assess shifts in capital investment and valuations
- Identifying risks and opportunities for plans

I12 Managing Investment Risk in an Uncertain Market

Monday, October 26 **10:45-11:45 a.m.**

- Identify key risks facing benefit plans today
- Understand market, demographic and industry risks
- Evaluate short-term liquidity and cash needs
- Align assets with long-term benefit obligations
- Strategies to consider

I13 Fixed Income Opportunities

1 **Tuesday, October 27** **10:45-11:45 a.m.**
2 **Wednesday, October 28** **7:30-8:30 a.m.**

- Review today's interest rate market and past trends
- Exploring different opportunities
- Correlation issues with equity market
- What credit spreads mean for your strategies
- Understanding treasury risk and duration risk

I14 Addressing Negative Cash Flow

Monday, October 26 **1:15-2:15 p.m.**

- What is negative cash flow?
- How can it impact a pension plan?
- Strategies to address negative cash flow
- Questions trustees should be asking their professionals

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Investments

I15 The State of Real Estate

1 Tuesday, October 27 1:15-2:15 p.m.
2 Wednesday, October 28 9:00-10:00 a.m.

- Current market review
- Understanding the market shifts and opportunities they present
- Exploring alternative property types
- Liquidity and valuation risks

I16 Infrastructure Investing for Tomorrow's Energy Transition

Monday, October 26 2:45-3:45 p.m.

- Review of the energy landscape
- The role of artificial intelligence
- Opportunities in energy
- Assess liquidity, fees and capital commitment structures
- Infrastructure's place within your portfolio strategy

I17 International Equities: Opportunities Abroad

Tuesday, October 27 2:45-3:45 p.m.

- Historical asset returns
- Understanding developed and emerging markets
- Currency management
- Geopolitical considerations
- Exploring the right mix in your portfolio

I18 Public Equity Markets Today

1 Monday, October 26 2:45-3:45 p.m.
2 Tuesday, October 27 2:45-3:45 p.m.

- Historical review of public equity
- Mega, large and small caps
- Growth and value styles and performance
- Opportunities outside of the "Magnificent Seven"
- Determining the right mix for your portfolio

I19 The Current State of Private Markets

1 Monday, October 26 10:45-11:45 a.m.
2 Tuesday, October 27 1:15-2:15 p.m.

- Historical review of asset class performance
- Liquidity and distribution issues
- Understanding fee structures
- Benchmarking practices
- Continuation vehicles

I20 Investment Consultant Townhall

Monday, October 26 2:45-3:45 p.m.

This facilitated panel discussion will offer an opportunity for investment consultants to discuss hot topics in the investment landscape.



Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Pension and Retirement

P01 Legal and Legislative Update for Retirement Plans

NT

1	**Monday, October 26**	**9:15-10:15 a.m.**
2	**Tuesday, October 27**	**10:45-11:45 a.m.**

- New legislative and regulatory developments
- State initiatives that may affect the plan sponsor
- Defined contribution litigation

P02 Understanding Withdrawal Liability

NT

1	**Monday, October 26**	**10:45-11:45 a.m.**
2	**Tuesday, October 27**	**9:15-10:15 a.m.**

- Overview of withdrawal liability
- Using separate assumptions for funding and withdrawal liability calculations
- Where/when does it apply, and are there exceptions?
- Approaches to manage withdrawal liability

P03 Advanced Withdrawal Liability Topics

1	**Monday, October 26**	**1:15-2:15 p.m.**
2	**Tuesday, October 27**	**10:45-11:45 a.m.**

- Using separate assumptions for funding and withdrawal liability calculations
- Complete or partial withdrawal liability
- PBGC regulations—What's new?
- Merger consequences
- Legal and other issues

P04 Actuarial Basics for the Nonactuary

P NT

1	**Monday, October 26**	**1:15-2:15 p.m.**
2	**Tuesday, October 27**	**1:15-2:15 p.m.**

- Understanding the valuation report
- Key assumptions and how they impact valuation and costs
- How changes in benefits affect long-term costs
- Understanding zone status
- What are present values and how are they calculated?

P05 Dueling Actuaries

P

1	**Monday, October 26**	**2:45-3:45 p.m.**
2	**Tuesday, October 27**	**2:45-3:45 p.m.**

In a series of short debates, learn about varying considerations and perspectives on the following:

- Moving the discount rate
- Discount rates for funding vs. withdrawal liability
- VAPPs
- Mortality rates
- Asset liability matching.

P06 Two Perspectives, One Plan: Investment Consultants and Actuaries

P NT

1	**Monday, October 26**	**1:15-2:15 p.m.**
2	**Tuesday, October 27**	**9:15-10:15 a.m.**

- Which comes first: The actuarial assumption or the investment allocation?
- What are your plan risks?
- Measuring your risks, current and future
- Implications for assumptions and investment allocation

P07 DOL Retirement Plan Audit Trends

1	**Monday, October 26**	**10:45-11:45 a.m.**
2	**Tuesday, October 27**	**1:15-2:15 p.m.**

Attend this session to learn about the Department of Labor's trends in retirement plan audits and investigations. Everything from current trends to future initiatives will be covered, as well as details on how to navigate an investigation successfully.

Program Content All Basic Advanced

NT Recommended for New Trustees

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Pension and Retirement

P08 Designing a Participant Education Plan

1 **Monday, October 26** **2:45-3:45 p.m.**
2 **Tuesday, October 27** **2:45-3:45 p.m.**

- Building a model of education
  —Goals of the retirement plan
  —Planning for the future
- Understanding distribution options
- Appropriate messages for participants, employers, trustees and administrators

P09 Modern Defined Contribution Design

1 **Tuesday, October 27** **1:15-2:15 p.m.**
2 **Wednesday, October 28** **7:30-8:30 a.m.**

- Ideal investment menu choices
- SECURE 2.0 considerations
- Required minimum distributions and income payout options
- Financial literacy and distribution education

P10 Innovations in Defined Contribution Plans

1 **Monday, October 26** **2:45-3:45 p.m.**
2 **Wednesday, October 28** **9:00-10:00 a.m.**

- Managed accounts and personalization tools
- New trends in investment menu options
- Custom target date plans
- Fee structures and cost reduction strategies
- Lifetime income strategies
- Legal risks to consider

P11 Challenges Facing Defined Contribution Plans

1 **Monday, October 26** **1:15-2:15 p.m.**
2 **Tuesday, October 27** **10:45-11:45 a.m.**

- What types are out there?
- Participant vs. trustee directed
- 401(k) vs. other plan types for the multiemployer world
- SECURE 2.0 implications
- How to complement your defined benefit (DB) plan (if you have one)

P12 Communicating Defined Contribution Plans to Participants

Monday, October 26 **10:45-11:45 a.m.**

- Choosing your contribution amount
- Participant understanding of vesting schedules
- Understanding fees and investment options
- In-service and retirement age distributions

P13 Defined Contribution Plan Risk—Options to Minimize and Mitigate

1 **Tuesday, October 27** **2:45-3:45 p.m.**
2 **Wednesday, October 28** **9:00-10:00 a.m.**

How to provide choice and manage risk, including:

- Annual expense review
- Target date fund review
- Overall expenses compared to a peer universe.

P14 Understanding Decumulation: Tools for Participants to Spend Down Retirement Assets

1 **Tuesday, October 27** **9:15-10:15 a.m.**
2 **Wednesday, October 28** **7:30-8:30 a.m.**

- What are participants doing before and when they are leaving a plan?
  —Preretirement sessions/education
- DC planning vs. DB plan roles
- Trustee responsibilities

Register at www.ifebp.org/usannual by September 14 to save and secure your hotel.

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Pension and Retirement

P15 Derisking Through a Funding and Benefit Policy

Monday, October 26 **9:15-10:15 a.m.**

- Gradual steps to strengthen funding and offer benefits responsibly
- Manage costs
- Clear benchmarks
- Support long-term plan stability and participant security

P16 My Pension Plan Is Well-Funded—Now What? Part I: Understanding Pension Plan Risk

1 Tuesday, October 27 **1:15-2:15 p.m.**
2 Wednesday, October 28 **7:30-8:30 a.m.**

Congratulations—Your plan is well-funded. But don't get too comfortable. A solid funded ratio today doesn't guarantee long-term success.

- What does it mean to be "well-funded"?
- What are the key risk factors to consider?
- How do assumption choices influence risk profile and stability?
- What is the impact of plan maturity?

P17 My Pension Plan Is Well-Funded—Now What? Part II: Considering Your Options

1 Tuesday, October 27 **2:45-3:45 p.m.**
2 Wednesday, October 28 **9:00-10:00 a.m.**

Once you've assessed your plan risk, it's time to consider the options. From investment strategies to benefit design to funding policies, a well-funded position opens the door to important—and sometimes difficult—decisions.

- Investment strategies tailored to plan maturity and cash flow needs
- Plan design features for long-term sustainability
- Considerations around benefit improvements
- The importance of stress testing and stochastic modeling

P18 Liability-Driven Investment to Manage the Risk of Unfunded Liabilities

1 Monday, October 26 **9:15-10:15 a.m.**
2 Tuesday, October 27 **10:45-11:45 a.m.**

- What is a liability-driven investment (LDI) strategy?
- How does LDI work in different interest rate environments?
- How can it manage risk?
- What impact can it have on the plan's financial health?
- How do LDI strategies apply in negative cash-flow situations?
- When is the right time to implement LDI?

P19 Understanding Alternative Plan Designs

1 Tuesday, October 27 **9:15-10:15 a.m.**
2 Wednesday, October 28 **9:00-10:00 a.m.**

- New trends in plan design
- Risk and return
- Options that are attractive to employers and participants
- Pros and cons of variable benefit plans

P20 Understanding Variable Annuity Pension Plans (VAPPs)

Monday, October 26 **9:15-10:15 a.m.**

- Balancing risk and reward
- Target return vs. hurdle rate
- Impact of under- or overachieving your target return
- Policies to consider

Program Content All Basic Advanced

Recommended for New Trustees

Recommended for Public Plans

Fund Professionals—Accountants

P-ACCT1 Accountants: Update from the Department of Labor

Monday, October 26 **9:15-10:15 a.m.**

A representative of the U.S. Department of Labor (DOL) has been invited to address topics, including:

- Regulatory agenda
- Enforcement activities and priorities
- Recent proposed and enacted guidance
- Other important issues and initiatives.

P-ACCT2 Accountants: Addressing Industry Challenges—Sharing Best Practices for Audit Firms

Monday, October 26 **10:45-11:45 a.m.**

Discussion on industry challenges wherein a panel of professionals will share best practices in key areas of the profession, including:

- Audit quality and standards
- Quality management standard
- Competing priorities
- Sampling techniques
- SFA silo accounting.

P-ACCT3 Accountants: Lessons Learned—DOL Practice Reviews

Monday, October 26 **2:45-3:45 p.m.**

- DOL practice review case studies
- Key takeaways for fund offices and auditing firms

P-ACCT4 Accountants: Navigating Tax Filings and Other Reports—Compliance Essentials

Tuesday, October 27 **9:15-10:15 a.m.**

- Form 5500
- Form 990/990-T
- Summary annual report
- Annual funding notice
- Zoning status certification
- Compensation disclosures

P-ACCT5 Accountants: Artificial Intelligence—Practical Uses and Emerging Trends

Tuesday, October 27 **10:45-11:45 a.m.**

- Use cases
- Benefits and risks
- Emerging trends

P-ACCT6 Accountants-Only Roundtables: Building Community

Wednesday, October 28 **7:30-8:30 a.m.**

This session is for accountants and auditors to have open discussions on hot topics and trends in accounting and auditing. These will include best practices, innovations, roadblocks and solutions as discussed by each table. Please arrive early to secure your spot in the session!

Register at www.ifebp.org/usannual by September 14 to save and secure your hotel.

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Fund Advisors—Attorneys

P-ATTY1 Attorneys: Changes to the Legal Landscape—Health Plans

Monday, October 26 **10:45-11:45 a.m.**

Attorneys will discuss recent trends in litigation against health plans and fiduciaries.

P-ATTY2 Attorneys: Changes to the Legal Landscape—Pension Plans

Monday, October 26 **1:15-2:15 p.m.**

Attorneys will discuss recent trends in litigation against pension plans and fiduciaries.

P-ATTY3 Attorneys: Ethical Considerations

Tuesday, October 27 **9:15-10:15 a.m.**

Attorneys will discuss recent developments in the representation of ERISA plan stakeholders. Potential topics include:

- What practitioners need to know about attorney-client privilege
- Work product doctrine and its representation
- The evolving ethical rules and considerations for attorneys.

P-ATTY4 Attorneys: A Guide to Successful Plan Mergers

Tuesday, October 27 **10:45-11:45 a.m.**

Attorneys will discuss their role at every phase of the plan merger process, including identifying merger partners, conducting due diligence, preparing plan documentation, communication and addressing special financial assistance.

P-ATTY5 Attorneys: From Paper to Practice—Making Policy Compliance Actually Work

Tuesday, October 27 **1:15-2:15 p.m.**

- Drafting, implementing and amending policies
- Overpayments
- Cybersecurity
- Artificial intelligence
- Missing participants

P-ATTY6 Attorneys: Trust Agreement—What Should and Should Not Be Included

Tuesday, October 27 **2:45-3:45 p.m.**

- Utilizing the trust agreement for productive plan administration
- Number of trustees and quorum
- Professional trustees
- Plan sponsors
- Arbitration breakout

Don't forget to register for the attorney-only preconference offering—

Ethics and Diversity in Employee Benefits

See page 15 for details.

Program Content All Basic Advanced

Recommended for New Trustees

Recommended for Public Plans

Public Plans

PE1 Public Sector Legislative and Regulatory Update

Monday, October 26 **9:15-10:15 a.m.**

Attend this session to learn about updates in the legislative and regulatory environment for health and welfare and retirement plans in the public sector.

PE2 Retiree Health Care Landscape—Public Plan Approaches

Monday, October 26 **10:45-11:45 a.m.**

- Overview of coverage options for pre- and post-Medicare enrollees
- Pros and cons for health plans and participants
- CMS guidance on 2026 plans and landscape for 2027

PE3 Navigating a Challenging Public Sector Environment

Monday, October 26 **1:15-2:15 p.m.**

- Complying with nonbenefit laws
  —Open meeting laws
  —Public procurement law
  —Public records requests
- Return-to-work rules
- Tips for effective public relations

PE4 Becoming a More Effective Public Pension Fiduciary

Monday, October 26 **2:45-3:45 p.m.**

- Overview of pension benefit projections model
- Funding components
- Overview of core pension plan design types
- Overview of pension plan design options
- The role of trustees in effective plan administration

PE5 Public Employers: Comparing Self-Funded and Fully Insured Health Plans

Tuesday, October 27 **9:15-10:15 a.m.**

This panel discussion will explore topics such as:

- Differentiating between plan funding structures
- Future challenges and opportunities
- Insights from small-, mid- and large-sized plans.

PE6 Stress Less, Serve Better: Addressing Public Worker Burnout

Tuesday, October 27 **10:45-11:45 a.m.**

- Causes of worker burnout, including wage freezes, staffing challenges and increased administrative burdens
- Role of mental health initiatives such as peer counseling, mobile apps, yoga and sound baths
- Low-cost considerations
- Best practices for implementation

Register at www.ifebp.org/usannual by September 14 to save and secure your hotel.

Program Content All Basic Advanced

Recommended for New Trustees

Recommended for Public Plans

Public Plans

PE7 The Retirement Timing Decision—Impact on Your Public Plan

Tuesday, October 27 **1:15-2:15 p.m.**

- Trends in public plan retirement ages
- Communication initiatives for plan participants
- Plan design considerations
- Impact on pension plan funding

PE8 Public Retirement Roadmap: Social Security Facts, Options and Next Steps

Tuesday, October 27 **2:45-3:45 p.m.**

- Public pension history
- Overview of public pension systems
- Social Security: Facts, integration and transition

PE9 Tools to Bring Back to Your Public Board

Wednesday, October 28 **9:00-10:00 a.m.**

- Fiduciary education principles
- Board self-evaluation parameters
- Components of an artificial intelligence policy
- Cybersecurity initiatives
- Strategic planning steps

P10 Public Employee-Only Roundtables: Building Community

Wednesday, October 28 **7:30-8:30 a.m.**

This session is for public employee fiduciaries and staff to have open discussions on hot topics and trends in the public sector.

Over 700 public plan representatives attend ever year!
Connect with others by attending these networking opportunities.

Public Plan Lunch Roundtables
Monday, October 26
11:45 a.m.-1:15 p.m.

Public Plan Reception
Monday, October 26
4:00-5:00 p.m.



Program Content All Basic Advanced

Recommended for New Trustees

Recommended for Public Plans

Apprenticeship, Training and Education

T01 Fiduciary Responsibility in Your Apprenticeship Programs

Monday, October 26 **9:15-10:15 a.m.**

- Keeping up with the latest legal and regulatory updates
- Prohibited transactions
- Plan documents
- Governance oversight: The role of the trustee

T02 Beyond the Numbers: Recruitment and Retention

Monday, October 26 **10:45-11:45 a.m.**

- Benchmarking your program
- Adapt outreach methods to address workforce shifts
- Preapprenticeship and nontraditional candidate programs
- Working with contractors to promote hiring
- Communicating the realities of the trades

T03 Succession Planning in Apprenticeship Programs for Staff and Trustees

Monday, October 26 **1:15-2:15 p.m.**

- Developing a structured succession plan
- Responding to changing workforce demographics
- Evaluating costs and incentive opportunities
- Identifying leaders and fostering growth
- Communicating value in the recruitment process

T04 Solutions—Mental Health and Substance Use Disorders in Apprenticeship Programs

Monday, October 26 **2:45-3:45 p.m.**

- Recognizing mental health issues
- Field-relevant prevention programs
- Practical programs that work
- Using technology
- Resources to use
- Legal and insurance implications

T05 Developing Critical Skills Needed for the Trades

Tuesday, October 27 **1:15-2:15 p.m.**

- Assessing skills needs of apprentices, journey workers and trainers
  - —Communication
  - —Emotional intelligence
  - —Resiliency
  - —Leadership
- Measuring success
- Sharing successful development initiatives

T06 Practical Applications for Using Artificial Intelligence in Your Apprenticeship Program

Tuesday, October 27 **10:45-11:45 a.m.**

- What tools are being used?
- Areas of use
  - —Curriculum development
  - —Analytics, evaluations and benchmarking
  - —In the classroom and on the jobsite
- Using AI effectively and responsibly
- Policies and best practices

T07 Apprenticeship-Only Roundtable: Building Community

Wednesday, October 28 **7:30-8:30 a.m.**

This session is for stakeholders to have open discussions on hot topics and trends in apprenticeship and training programs. These will include best practices, innovations, roadblocks and solutions as discussed by each table. Please arrive early to secure your spot in the session!

Program Content All Basic Advanced

Recommended for New Trustees

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Continuing Education

Sessions at the in-person Annual Conference may qualify for continuing education (CE) credit hours for numerous designations. The International Foundation seeks approval based on requests received **at least 90 days in advance**. When you register to attend the in-person conference, request CE credit on your registration form. Please note: Requests made for CE credit do not guarantee administration of credit. Visit www.ifebp.org/usannualCE to learn more. For questions, contact us at (262) 786-6710, option 2, or continuinged@ifebp.org

CEBS® COMPLIANCE CREDIT

Annual Conference sessions may qualify. Visit www.cebs.org/compliance for information.

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Approval is based upon requests and is not automatically sought in all states. Only certain sessions will be eligible for credit, and a list will be provided on site.

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INVESTMENTS

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ACCOUNTING

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education (CPE) on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

ENROLLED ACTUARY

Only certain sessions will be eligible for credit, and a list will be provided on site.

CONTINUING EDUCATION CERTIFICATE

In Person—Yellow CE slips can be picked up in the registration area and must be filled out completely and submitted at the end of each session to ensure proper administration of credit. Due to state and license board regulations, forms cannot be accepted at any other time. **These forms are in addition to having your badge scanned, as badge scanning does NOT qualify for CE credit.**

Note: CE certificate is separate from your International Foundation certificate of attendance.

Questions?

Visit www.ifebp.org/usannualCE for details and information on submitted sessions.
You can also contact our CE department at (262) 786-6710, option 2, or continuinged@ifebp.org with questions.

Make Connections in the Exhibit Hall

Be part of the nation's largest conference in the employee benefits field by exhibiting at or sponsoring the 72nd Annual Employee Benefits Conference! Increase your brand exposure and build your business. Exhibits and sponsorships provide you with an opportunity for in-person contact with our audience of 5,000+ multiemployer and public sector trustees, administrators and support staff who represent billions of dollars in health and welfare and pension fund assets!

LIMITED BOOTH SPACE AVAILABLE



WHY EXHIBIT AND SPONSOR?

- Get premium, in-person access to our decision-making attendees who represent over a billion dollars in fund assets
- Have the opportunity to meet with existing clients, build relationships and stand out from the competition by learning about key issues concerning and impacting their members and customers.
- Join 250+ exhibitors and sponsors who are already building their business with Foundation members.

NEW FOR 2026! SOLUTIONS SPOTLIGHT

If you're looking for more in-depth information about specific employee benefit products or services offered by some of our conference exhibitors or sponsors, consider attending a Solutions Spotlight. These half-hour sessions include a company presentation followed by time for questions and answers. Seven Solutions Spotlights will be hosted in a designated area within the exhibit hall. Sessions are scheduled for Sunday afternoon and during lunch on Monday and Tuesday.

Solutions Spotlight presentations do not count towards educational sessions.

Visit www.ifebp.org/solutionspotlight to learn more.







CONTACT US TODAY!

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List Pulled 6/10/2026

Conference Details

TRANSPORTATION

Complimentary shuttle bus service will be provided to all conference registrants, exhibitors and guests from Friday, October 23 through Wednesday, October 28, 2026. Shuttle service will be provided to those hotels listed on page 43 with the bus icon.

Prior to the Conference

If you have special transportation needs or questions regarding the shuttle system, please contact Bridget Mergen, coordinator of shuttle service, at (262) 373-7655 or bridgetm@ifebp.org.

Wheelchair and Scooter Rentals

Mobility scooter rental is available at MCCNO at the UPS Store (www.theupsstorelocal.com/6216), located in Lobby F. We welcome and encourage our guests to make arrangements in advance. Wheelchairs are also available upon request. Visit www.scootaround.com or call 1-888-441-7575.

POLICIES AND GUIDELINES

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 (3) days (eight (8) days for Disney properties) of arrival. Registration fee is forfeited once program commences. For a complete list of policies, see www.ifebp.org/policies. For rules of conduct and regulations, visit www.ifebp.org/usacguidelines.

FRIENDS OF BILL W.

Meetings will be held during the Annual Conference. Meeting times and location information will be listed on the conference app and in the conference guide.

Acknowledgments

A special thank you for our Executive Committee and supporting committees for their time and efforts in developing the 72nd Annual Employee Benefits Conference.

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Get Involved and Give Back

Make the most of your time between sessions! The Hospitality Hub, new exhibit hall offerings, and a kit-building opportunity benefiting a local charity are all here to jazz up your conference experience—whether you're looking to connect, explore, or give back. Stop by during breaks and get involved.

STARTING SATURDAY

Gear up!

Update your wardrobe and show your Foundation pride by checking out merchandise at the store.



Learn!

Discover educational opportunities through the Foundation's affiliate organization, the Wellness Alliance.

Carry the conference in your pocket!

Make sure you're using the conference app and get help if something isn't working (starting Friday at 7:00 a.m.).



Ask Questions!

Learn more about your Foundation membership, next steps in your educational journey or the Annual Conference itself.

STARTING MONDAY

Recharge!

Grab a snack, get some juice back in your device and catch up on your day job at a workstation.



Relax!

Enjoy a complimentary massage and unwind from all that learning!
(Located in the exhibit hall)



Strike a pose!

Update your profile photo with a complimentary new headshot.
(Located in the exhibit hall)

Give back!

Build a kit benefiting the Youth Empowerment Project, a nonprofit focused on supporting underserved youth in New Orleans.

2026 Hotel Information

Visit www.ifebp.org/neworleanshotels for hotel details. Reservations must be booked through the International Foundation to receive the discounted rates below. Hotel reservations are confirmed on a first-come, first-served basis. Best available will be assigned. If you don't receive your preferred hotel, **please call the Registration Department at (888) 334-3327, option 2, to be placed on a waitlist.**

Hotel Reservation Deadline: September 14, 2026

Be sure to list the roomt type (letter and number) on your registration form to confirm your room and view preference.

Shuttles will be provided to these hotels.

1 Courtyard New Orleans Downtown Near the French Quarter
IF Block: 75
1A: $275, Run of House, Single/Double

2 Courtyard by Marriott New Orleans Warehouse Arts District
IF Block: 150
2A: $289, Run of House, Single/Double

3 Embassy Suites by Hilton New Orleans
IF Block: 200
3A: $285, Run of House, Single/Double

4 Four Seasons Hotel New Orleans
IF Block: 50
4A: $475, Run of House, Single/Double

5 Hampton Inn & Suites New Orleans-Convention Center
IF Block: 100
5A: $269, Run of House, Single/Double

6 Higgins Hotel New Orleans, Curio Collection by Hilton
IF Block: 100
6A: $285, Run of House, Single/Double

7 Hilton Garden Inn New Orleans Convention Center
IF Block: 100
7A: $254, Run of House, Single/Double

8 Hilton New Orleans Riverside*
IF Block: 1,000
8A: $305, Run of House, Single/Double

9 Hotel Monteleone
IF Block: 275
9A: $309, Run of House, Single/Double
9B: $359, Superior King, Single/Double

10 Hyatt Place New Orleans Convention Center
IF Block: 130
10A: $274, Run of House, Single/Double

11 InterContinental New Orleans
IF Block: 200
11A: $255, Run of House, Single/Double

12 JW Marriott New Orleans
IF Block: 200
12A: $309, Run of House, Single/Double
12B: $332, Room with View, Single/Double
12C: $355, Executive King, Single/Double

13 Le Méridien New Orleans
IF Block: 150
13A: $309, Classic, Single/Double
13B: $332, Superior Room, Single/Double

14 Loews New Orleans Hotels*
IF Block: 200
14A: $311, Deluxe Room, Single/Double
14B: $334, Grand Luxury, Single/Double

15 New Orleans Marriott
IF Block: 400
15A: $309, Run of House, Single/Double
15B: $332, City View, Single/Double
15C: $355, Riverview, Single/Double

16 New Orleans Marriott Warehouse Arts District
IF Block: 150
16A: $309, Run of House, Single/Double

17 Q&C Hotel and Bar New Orleans, Autograph Collection
IF Block: 150
17A: $229, Run of House, Single/Double

18 Renaissance New Orleans Arts Warehouse District Hotel
IF Block: 175
18A: $298, Run of House, Single/Double

19 Renaissance New Orleans Pere Marquette French Quarter Area
IF Block: 100
19A: $289, Run of House, Single/Double

20 Sheraton New Orleans
IF Block: 400
20A: $309, Run of House, Single/Double
20B: $332, Deluxe Room, Single/Double
20C: $366, Club Room, Single/Double

21 SpringHill Suites by Marriott New Orleans Warehouse Arts District
IF Block: 150
21A: $295, Run of House, Single/Double

22 The Ritz-Carlton, New Orleans
IF Block: 300
22A: $355, Run of House, Single/Double

23 The Riverfront Hotel New Orleans
IF Block: 175
23A: $269, Run of House, Single/Double

24 The Royal Sonesta
IF Block: 200
24A: $325, Deluxe Room, Single/Double

25 The Westin New Orleans Canal Place
IF Block: 225
25A: $275, Run of House, Single/Double

26 The Windsor Court Hotel
IF Block: 130
26A: $355, Premium Suite, Single/Double

27 Fairmont New Orleans
IF Block: 100
27A: $395, Run of House, Single/Double

28 Kimpton Hotel Fontenot
IF Block: 100
28A: $309, Run of House, Single/Double

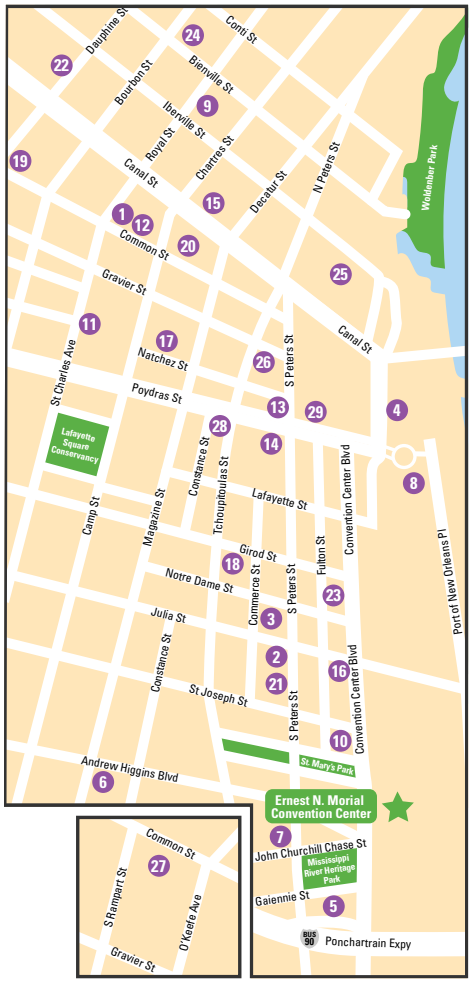
29 Caesars New Orleans*
IF Block: 50
29A: $399, Run of House, Single/Double

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Hotel rates include a $10 nightly per room facility charge. Taxes and fees are not included in room rate.

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