

EMPLOYEE BENEFITS EDUCATION 2024-2025



TRAINING

RESEARCH

COMMUNITY

PROFESSIONAL
DEVELOPMENT

FUEL YOUR WORK THROUGH EDUCATION

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

Let the International Foundation fuel your work through education.

WHY CHOOSE THE FOUNDATION FOR YOUR EDUCATION?

If you work in employee benefits, no day is ever the same. The last thing you want to spend your time researching is where to find vetted, impartial, quality education and information to stay compliant and informed. Since 1954, the Foundation has served as the largest organization for employee benefits education. Our focus is:

- Content developed and delivered by leaders who actually work in the field and relate to the day-to-day challenges you face
- Unique networking opportunities, both virtual and in person, so you can meet and share ideas with others who understand your role
- Clear tools and takeaways, with hundreds of educational options and delivery methods to choose from
- Timely information so you can respond quickly to changing laws, regulations and industry trends.

BE PART OF SOMETHING BIG.



PROGRAMS BY TOPIC

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

HEALTH CARE

In-person conferences:

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

Virtual conferences:

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

In-person certificates:

- Certificate in Health and Welfare Plans

Online certificates:

- Certificate in Health Plan Navigation
- Fundamentals in Health Benefits

ORGANIZATIONAL WELLNESS

In-person conferences:

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

Virtual conferences:

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

RETIREMENT

In-person certificate:

- Certificate in Retirement Plans

Online certificate:

- Fundamentals in Retirement Plans

GLOBAL

In-person conferences:

- CONNECT Global Employee Benefits and Workforce Strategies Summit

In-person certificates:

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

Virtual workshop:

- Global Benefits Fundamentals

COMPLIANCE AND BENEFITS MANAGEMENT

In-person conferences:

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

In-person certificates:

- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Strategic Benefits Management

Online certificates:

- Certificate in Absence Management
- Certificate in ERISA Compliance
- Certificate in Public Plan Administration
- Certificate in Self-Funding Group Health Plans

Over 40 e-learning courses cover a range of topics. See pages 25-31 for a full listing.

MAKE THE MOST OUT OF THIS CATALOG

First, identify what sector you best represent, depending on your role. You'll notice these symbols throughout so you can easily identify the programs designed for you:

CORPORATE PLAN SPONSORS CP

These are benefit plans maintained by one employer.

Industries represented: Wide-ranging—technology, retail, energy, manufacturing

Example roles/titles: Benefits Manager, Director of Health Care Strategy, Senior Director of Human Resources, Director of Global Benefits, Director of Retirement Services, Benefits Analyst, Vice President, Director of Compensation and Benefits

GLOBAL G

These are multinational employers responsible for international global benefits management.

Example roles/titles: Global Benefits Specialist; Manager, International Benefits; Senior Manager, Global Benefits; Global Benefits Consultant; International Benefits Consultant; Senior Director, Global Benefits; Senior Global Benefits Analyst; Manager Benefit Operations, North America

MULTIEMPLOYER PLANS ME

Also known as Taft-Hartley plans in the U.S., these benefit plans are the result of a collectively bargained plan to which more than one employer contributes and typically involve one or more local unions.

Industries represented: Construction-dominated, also hospitality/service, entertainment

Example roles/titles: Trustee, Labor Relations Director, Executive Director, Fund Administrator, Business Manager, Training Coordinator, Secretary-Treasurer

PUBLIC EMPLOYER PLANS PE

These are benefit plans established for employees of a federal, state, provincial and/or local government as well as those who work for publicly funded organizations such as police or fire systems, school systems and universities.

Systems represented: State, provincial and local systems; school systems; safety (police and fire) systems

Example roles/titles: Executive Director; Director, Health Care; Director, Member Benefits; Chief Investment Officer; Trustee; Board Member; City Manager; Plan Administrator

Also note the different delivery methods of education throughout:

- Training for your role
- In-person conferences/courses
- In-person certificates
- Online certificates
- E-learning courses

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

70TH ANNUAL EMPLOYEE BENEFITS CONFERENCE

70th Annual Employee Benefits Conference ME PE

Virtual option available | Preconferences available

November 10-13, 2024 | San Diego, California

www.ifebp.org/usannual

What you know can make a big difference in what you do. Expand your learning and rewrite what it means to be an exceptional trustee or administrator at the 70th Annual Employee Benefits Conference. Join 5,000 of your fellow employee benefits peers from across the country as you learn through ten tracks representing over 120 sessions. This is the only event where you'll gain knowledge from those who truly understand your day-to-day challenges.

Who Should Attend:

- Taft-Hartley fund trustees, administrators, business managers and association leaders
- Public sector plan trustees and staff
- Fund administrators and managers
- Third-party administrators (TPAs)
- Benefit consultants
- Attorneys, accountants and actuaries
- Investment managers and consultants
- Coalition leaders
- Others who are involved in the overall management and administration of benefit trust funds

SAVE THE DATE!

71st Annual Employee Benefits Conference is November 9-12, 2025 in Honolulu, Hawaii.



For those who work with corporate benefit plans . . .

43RD ANNUAL
ISCEBS Employee Benefits
Symposium

**43rd Annual ISCEBS
Employee Benefits Symposium**

CP

September 15-18, 2024 | Nashville, Tennessee
www.ifebp.org/symposium

The Symposium is one of the largest gatherings of benefits professionals in the country hosted by one of the International Foundation's partner organizations, the International Society of Certified Employee Benefit Specialists (ISCEBS). Come for the specific, focused information you need for your plans and participants; stay for the new ideas, perspectives, tools and data you need to stay ahead of the curve in the changing world of work and to maintain a competitive and engaging benefits experience.

Dig deep into the newest trends and compliance requirements for health and retirement benefits plans and know you're learning from—and with—some of the best benefits experts from across North America. You'll come away with knowledge and strategies for a strong and comprehensive benefits approach and the connections to propel your career forward.

SAVE THE DATE!

44th Annual ISCEBS Employee Benefits Symposium is September 14-17, 2025 in Minneapolis, Minnesota.



IN-PERSON CONFERENCES/COURSES

www.ifebp.org/education



WELCOA[★]
WELLNESS COUNCIL OF AMERICA



Annual Wellness Summit

August 26-29, 2024 | Chicago, Illinois

August 18-21, 2025 | Austin, Texas

PE CP

The Annual Wellness Summit will combine two long-standing events—the WELCOA Summit and NWI's National Wellness Conference—into one powerful gathering of wellness thought leaders, experienced practitioners and industry experts. Concurrent sessions will allow for a custom conference experience while offering meaningful opportunities to connect with the industry's top leaders.

Why You Should Attend:

- Walk away with new strategies, connections and resources
- Get information so you can advance well-being for yourself, your workplace and your community
- Hear from experts on the latest trends and best practices for wellness
- Participate in activities that prepare the mind and body for optimal learning
- Evaluate current challenges and develop actionable solutions



Collection Procedures Institute

October 14-15, 2024 | Washington, D.C.

September 29-30, 2025 | Monterey, California

ME

The Collection Procedures Institute will provide you with the information you need to fulfill your fiduciary responsibility to collect benefit payments. This course will present best practices, trends, and legal and legislative updates from expert instructors. Benchmark your policies and procedures and network with those who face similar challenges.

Why You Should Attend:

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



Institute for Apprenticeship, Training and Education Programs

Preconference available

January 12-15, 2025 | Lake Buena Vista (Orlando), Florida

Virtual option available

ME PE CP

This conference will address the current and relevant issues that are impacting your program, providing the clarity you need to plan for the future. Learn from experts and share ideas, opportunities and lessons learned with your peers so you return with actionable plans to implement.

Why You Should Attend:

- Learn best practices in the management of your fund and running your training program
- Understand legal and regulatory requirements
- Discover strategies to avoid mistakes and reduce risks for your fund
- Take away best practices for succession planning and creating the next generation of leaders
- Learn more about mental health and substance use in your program

IN-PERSON CONFERENCES/COURSES

www.ifebp.org/education



34th Annual Health Benefits Conference & Expo (HBCE)

PE CP

Preconference available

January 27-29, 2025 | St. Pete Beach, Florida

Using employer case studies that offer proven solutions along with insights from experts paving the way in their organizations, HBCE will guide you in identifying the right formula for positive outcomes at your organization.

Why You Should Attend:

- Hear from industry leaders who have faced the same issues you have, and learn what worked for them to reduce costs and improve employee engagement
- Learn diabetes and obesity risk management strategies for health plans
- Discover how to focus on employee engagement to drive health and wellness outcomes
- Find out how plan sponsors can help break the cycle on the rising costs of specialty drugs



Advanced Trustees and Administrators Institute

ME

Preconference available | February 9-12, 2025 | Orlando, Florida

June 22-25, 2025 | Nashville, Tennessee

Developed by active trustees, administrators and professional advisors, each session will address current issues, providing the relevant information you need to make sound decisions for your fund. Learn the latest industry trends and legal and regulatory changes, all while gathering new ideas and a deeper understanding of how to run your pension and health and welfare fund.

Why You Should Attend:

- Learn from industry experts about the current state of affairs and latest reform initiatives—Be prepared for what lies ahead.
- Network with peers who face similar challenges—Learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to implement.
- Bring home helpful resource materials to share with colleagues, from sample documents to checklists and case studies—The value of your attendance will continue long after you've left the program.



35th Annual Art & Science of Health Promotion Conference

PE CP

Intensive Training Seminars available

March 31-April 4, 2025 | Scottsdale, Arizona

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

Why You Should Attend:

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

IN-PERSON CONFERENCES/COURSES

www.ifebp.org/education



Health Care Management Conference

April 28-29, 2025 | Fort Myers, Florida

ME PE

Health plan trustees and administrators are responsible for designing coverage that is cost-effective, attains the highest health outcomes and is equitable for all, but it's easy to fall off track. The Health Care Management Conference is designed to explore how to create a better plan for your entire fund through the whole-worker approach, focusing on how the health plan supports workers' physical, mental and professional well-being.

Why You Should Attend:

- Learn what's on the horizon for the prescription drug landscape and how to meet the needs of participants while controlling costs
- Discover the importance of connecting health, safety and well-being initiatives into a trust fund environment
- Find out the latest cost-containment strategies and what's working for other trustees and administrators
- Learn what offerings your organization should consider for family-friendly benefits



Investments Institute

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

ME PE

Learn from highly regarded experts in the field of investing, hear current perspectives on the global economy and discuss your fund's strategies with trustees from other funds. Discover alternative investment options and get key questions answered that will help enhance your fund's investments.

Why You Should Attend:

- Hear from experts on the economic outlook so you can understand how these issues factor into the markets and shape the future for investors
- Learn how you can protect your plan from inflation and how it's changing
- Discuss misconceptions such as lock-up periods, fees and liquidity as well as learn the questions you need to be asking managers
- Discover trends in real estate in today's market



Sponsorship and Exhibitor Opportunities

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



IN-PERSON CONFERENCES/COURSES

www.ifebp.org/education



Washington Legislative Update

May 19-20, 2025 | Washington, D.C.



Receive the latest need-to-know information on legislative changes impacting plans and plan participants, and gain the tools to prepare for what's ahead. Connect with your peers as you get the latest information and develop plans to address the challenges you face, such as the current political landscape, mental health and substance abuse, coverage for the LGBTQ+ community, the economy and the debt limit.

Why You Should Attend:

- Learn how to maximize your engagement efforts when meeting with government officials—from the details of the legislative process to the players who impact benefits
- Connect with representatives from the key agencies (DOL, IRS, PBGC, HHS) responsible for enforcement and oversight in the employee benefits industry
- Discover the latest changes to labor law and insight on what's ahead
- Receive a health care update and learn more about retirement plan designs



Accounting and Auditing Institute for Employee Benefit Plans

June 23-25, 2025 | Nashville, Tennessee



Do you audit employee benefit plans? It's a complicated industry—Make sure you're staying up to date on the latest in reporting and disclosure requirements by attending this event. Ask questions and learn from the experts so you can better understand the current issues impacting multiemployer pension and health and welfare plans.

Why You Should Attend:

- Get the most up-to-date information on plan disclosure requirements
- Understand the current issues that impact multiemployer pension and health and welfare plan audits
- Network with your peers who face similar challenges, and brainstorm workable solutions
- Earn meaningful continuing professional education (CPE) credits



Fraud Prevention Institute for Employee Benefit Plans

July 14-15, 2025 | Chicago, Illinois



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

Why You Should Attend:

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

IN-PERSON CERTIFICATES

www.ifebp.org/certificateseries

The Certificate Series offers educational opportunities in each of the areas of benefits and compensation. Take a single course for education in a specific area or take three courses to earn a topic-specific Certificate of Achievement.



Certificate in Benefit Plan Administration

PE CP

The complexities of managing and administering employee benefit plans in today's environment require knowledge and skills in a variety of areas. The Certificate in Benefit Plan Administration provides a survey of the core operational and strategic areas, including human resources strategies, risk management, communication, technology, funding/finance and vendor management, and it helps you adapt your total rewards strategies to your organization's needs.

Required Courses

- Basics of Employee Benefits Administration
- Communicating Employee Benefits

Elective Courses: Choose One

- Funding and Finance of Health Benefits
- Total Rewards and Workforce Strategies

Certificate in Benefit Plan Administration Course Schedule

Course Name	September 2024 Nashville, Tennessee	February 2025 San Diego, California	July 2025 Chicago, Illinois
Basics of Employee Benefits Administration	September 14-15	February 24-25	July 14-15
Communicating Employee Benefits	September 16-17	February 26-27	July 18-19
And Choose One			
Total Rewards and Workforce Strategies*	September 18-19	February 28-March 1	July 16-17
Funding and Finance of Health Benefits*	September 18-19	February 28-March 1	July 16-17



Certificate in Benefits and Compensation

PE CP

Attracting and retaining a productive workforce requires balancing the three key components of a total rewards strategy: compensation, health plans and retirement plans. The Certificate in Benefits and Compensation provides a survey of these three components as well as a chance to develop your baseline technical skills in compensation concepts.

Required Courses

- Basic Compensation Concepts
- Health Benefit Plan Basics
- Retirement Plan Basics

Certificate in Benefits and Compensation Course Schedule

Course Name	September 2024 Nashville, Tennessee	February 2025 San Diego, California	July 2025 Chicago, Illinois
Retirement Plan Basics*	September 18-19	February 28-March 1	July 18-19
Health Benefit Plan Basics*	September 14-15	February 24-25	July 14-15
Basic Compensation Concepts	September 16-17	February 26-27	

*These courses apply to more than one certificate.

IN-PERSON CERTIFICATES

www.ifebp.org/certificateseries



Certificate in Health and Welfare Plans



As the legislative and regulatory landscape in health care continues to evolve, it is important to stay informed about the latest changes and trends. The Certificate in Health and Welfare Plans provides plan management strategies and plan design options, including managed care fundamentals, consumer-driven health care and value-based strategies as well as a survey of ancillary benefit plans.

Required Courses

- Health Benefit Plan Basics
- Health Care Cost Management

Elective Courses: Choose One

- Ancillary Benefit Plans
- Funding and Finance of Health Benefits

Certificate in Health and Welfare Plans Course Schedule

Course Name	September 2024 Nashville, Tennessee	February 2025 San Diego, California	July 2025 Chicago, Illinois
Health Benefit Plan Basics*	September 14-15	February 24-25	July 14-15
Health Care Cost Management*	September 16-17	February 26-27	July 18-19
And Choose One			
Ancillary Benefit Plans	September 18-19	February 28-March 1	
Funding and Finance of Health Benefits*	September 18-19	February 28-March 1	July 16-17



Certificate in Retirement Plans



The challenges of funding for retirement have brought a host of changes in the laws, regulations and trends that impact retirement plans. The Certificate in Retirement Plans 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.

Required Courses

- Investment Basics*
- Retirement Plan Basics*

Elective Courses: Choose One

- 401(k) Plans
- Public Sector 401, 403 and 457 Plans*

Certificate in Retirement Plans Course Schedule

Course Name	September 2024 Nashville, Tennessee	February 2025 San Diego, California	July 2025 Chicago, Illinois
Retirement Plan Basics*	September 18-19	February 28-March 1	July 18-19
Investment Basics*	September 16-17	February 26-27	
And Choose One			
401(k) Plans	September 14-15	February 24-25	

*These courses apply to more than one certificate.

IN-PERSON CERTIFICATES

www.ifebp.org/certificateseries



Certificate in Strategic Benefits Management*

PE CP

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 resources goals. The Certificate in Strategic Benefits Management 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.

Required Courses

- Health Care Cost Management*
- Organizational Strategies for Health and Financial Wellness
- Total Rewards and Workforce Strategies*

Certificate in Strategic Benefits Management Course Schedule

Course Name	September 2024 Nashville, Tennessee	February 2025 San Diego, California	July 2025 Chicago, Illinois
Organizational Strategies for Health and Financial Wellness	September 14-15	February 24-25	July 14-15
Total Rewards and Workforce Strategies*	September 18-19	February 28-March 1	July 16-17
Health Care Cost Management*	September 16-17	February 26-27	July 18-19



Certificate in Public Sector Benefits Administration

PE

Financing, politics, and the legal and regulatory environment pose challenges and opportunities that require professionals to understand how public plans operate. The Certificate in Public Sector Benefits Administration is earned by taking 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.

Required Courses

- Introduction to Public Sector Benefits Administration

Elective Courses: Choose One

- Health Benefit Plan Basics
- Health Care Cost Management*
- Investment Basics
- Public Sector 401, 403 and 457 Plans
- Retirement Plan Basics*

Public Sector Benefits Administration Course Schedule

Course Name	September 2024 Nashville, Tennessee	February 2025 San Diego, California	July 2025 Chicago, Illinois
Introduction to Public Sector Benefits Administration			July 16-17
And Choose Two			
Retirement Plan Basics*	September 18-19	February 28-March 1	July 18-19
Public Sector 401, 403 and 457 Plans*			
Investment Basics*	September 16-17	February 26-27	
Health Benefit Plan Basics*	September 14-15	February 24-25	July 14-15
Health Care Cost Management*	September 16-17	February 26-27	July 18-19

*These courses apply to more than one certificate.

TRAINING FOR YOUR GLOBAL BENEFITS ROLE

www.ifebp.org/global

GLOBAL

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



Certificate in Global Benefits Management

February 24-28, 2025 | San Diego, California

July 14-18, 2025 | Chicago, Illinois

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



Certificate in Canadian Benefit Plans

October 6-8, 2025 | Austin, Texas

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



CONNECT Global Employee Benefits and Workforce Strategies Summit

July 21-23, 2025 | Dallas, Texas

International Foundation of Employee Benefit Plans  WorldatWork®
Total Rewards Association

Learn key issues, trends and opportunities for developing and maintaining a global Total Rewards strategy. This new partnership between the International Foundation and WorldatWork allows two industry leaders to combine their expertise and provide comprehensive solutions for multinational HR, employee benefits and Total Rewards professionals.



Global Benefits Fundamentals

December 3-4, 2024 | Virtual Workshop

This live virtual workshop is for those new to global employee benefits, including those who have significant benefits experience in their home country but limited exposure to benefits at a multinational company.



TRAINING FOR YOUR TRUSTEE ROLE

www.ifebp.org/education

Focused Learning for Multiemployer Trustees

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



New Trustees Institute—Level I: Core Concepts

ME

November 9-11, 2024 | San Diego, California

February 10-12, 2025 | Orlando, Florida

June 23-25, 2025 | Nashville, Tennessee

November 8-10, 2025 | Honolulu, Hawaii

If you're a new trustee serving on multiemployer health, retirement or other ERISA plans, this is the event for you. Learn all about your role and your responsibilities as a fiduciary. You'll gain a solid understanding of best practices, legal requirements and current issues that the benefits industry is facing, plus you'll have time to network with other new trustees facing similar challenges you are.



Trustees Institute—Level II: Concepts in Practice

ME

November 9-10, 2024 | San Diego, California

February 8-9, 2025 | Orlando, Florida

June 21-22, 2025 | Nashville, Tennessee

November 8-9, 2025 | Honolulu, Hawaii

This course is for experienced multiemployer trustees who have completed the Level I course. The curriculum will take a deeper dive into the benefits industry and your oversight role with a focus on practical application. This highly interactive learning experience will give you the framework and tools you need to address the many challenges you face as a trustee.



Trustees Masters Program (TMP)

ME PE

November 9-10, 2024 | San Diego, California

November 8-9, 2025 | Honolulu, Hawaii

The Trustees Masters Program (TMP) is for advanced-level trustees who want to gain a deeper insight into their role as well as interact with peers. You'll receive special recognition for your knowledge and participation with a TMP certificate and pin.



TMP Advanced Leadership Summit

ME PE

November 10, 2024 | San Diego, California

November 9, 2025 | Honolulu, Hawaii

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

TRAINING FOR YOUR TRUSTEE ROLE

www.ifebp.org/education

Education for Public Employer Trustees

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



Certificate of Achievement in Public Plan Policy (CAPPP®): Pensions Part II PE

November 9-10, 2024 | San Diego, California

An essential program for new public sector trustees working with employee pensions, this program addresses the fundamental areas involved in managing employee pension plans. Sessions dissect the basics of what you need to know for your role, and the distinguished faculty bring real-life scenarios and years of experience to enrich the content and your takeaways.



Certificate of Achievement in Public Plan Policy (CAPPP®): Health Part II PE

November 9-10, 2024 | San Diego, California

An essential program for public sector trustees and staff working with employee/member health plans, this program addresses the fundamental areas involved in managing employee health plans. Sessions dissect the basics of what you need to know for your role, and the distinguished faculty bring real-life scenarios and years of experience to enrich the content and your takeaways.



Public Plan Trustees Institute Level I PE

July 15-17, 2025 | Chicago, Illinois

Gleacher Center

New educational offering for public sector trustees and fiduciaries. Stay tuned for more details!

Final offering of CAPPP!

Attend in San Diego or stay tuned for new education for public sector trustees coming in 2025. Contact Justin Held for details at justinh@ifebp.org.

PE

CUSTOMIZED EDUCATION FOR YOUR TEAM

www.ifebp.org/onsite-education

The Foundation's flexible on-site or online training brings industry-leading employee benefits education to your workplace. As your partner in education, we work with you to meet your unique training goals. With more than 60 years as a leading employee benefits education provider, we can help you prioritize your objectives and provide a cost-effective solution to meet your unique needs. Whether it's in-person education or online learning, we can offer both off-the-shelf and customized training solutions.



IN PERSON

Bring the experts to you—your city, your workplace, your staff. Having a subject matter expert at your organization allows for a one-of-a-kind learning and team-building experience.



E-LEARNING COURSES

Industry-leading online education provides comprehensive and interactive training for your staff. Choose from more than 30 e-learning courses that can be housed on your internal LMS for easy tracking and grading.



WEBCASTS

Offering a series of webcasts is a cost-effective and convenient way to train staff wherever they are located. Direct interaction with subject matter experts allows for your specific issues to be addressed.

Our Most Popular Options for On-Site Training Include:

Multiemployer Education

- New Trustees Institute—Level I: Core Concepts
- Certificate in Health and Welfare Plans
- Certificate in Retirement Plans

Public Employer Education

- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Health and Welfare Plans
- Certificate in Public Sector Benefits Administration
- Certificate in Retirement Plans
- Certificate in Strategic Benefits Management

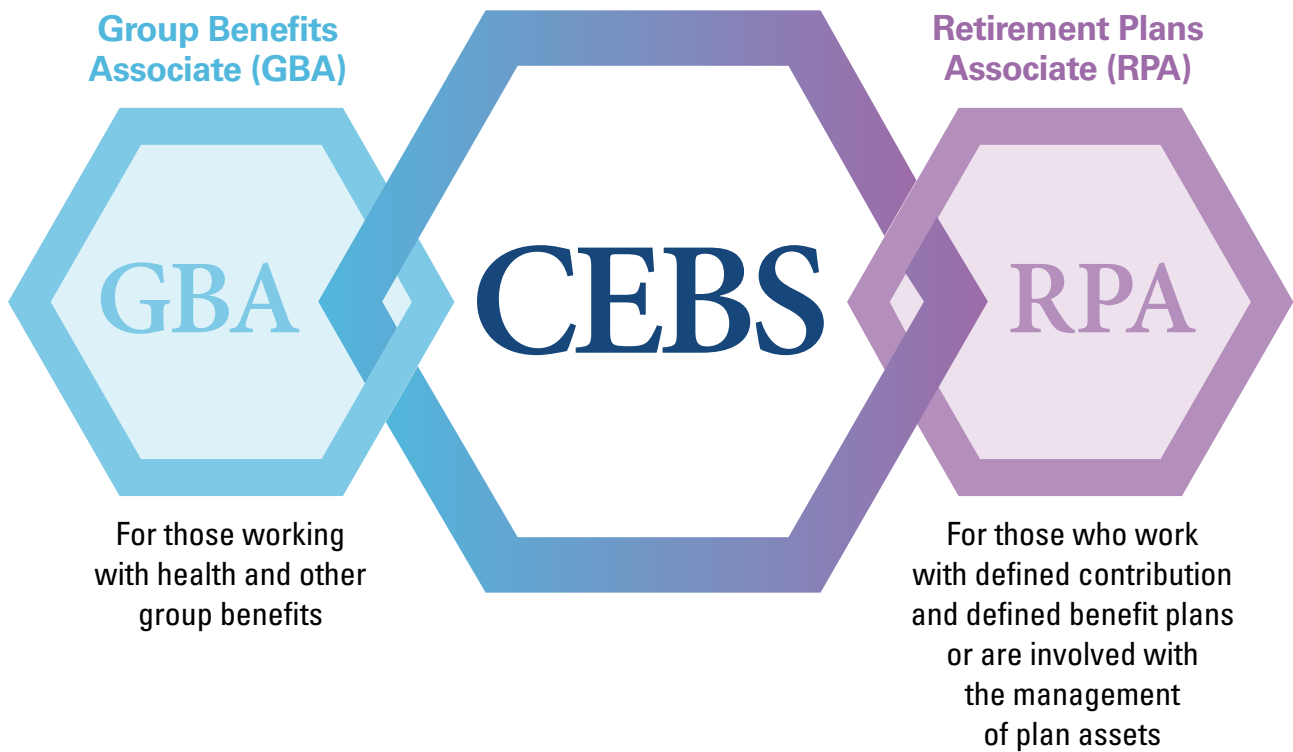
Corporate/Single Employer Education

- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Health and Welfare Plans
- Certificate in Retirement Plans
- Certificate in Strategic Benefits Management

EMPLOYEE BENEFITS DESIGNATIONS

www.cebs.org

The **Certified Employee Benefit Specialist® (CEBS®)**, **Group Benefits Associate (GBA)** and **Retirement Plans Associate (RPA)** are highly regarded employee benefits designations providing expertise to those in the field. The curriculum is developed by the Wharton School of the University of Pennsylvania and is supported by research-based best practices. Whether you are looking to break into the industry, currently work in employee benefits or are an experienced benefits professional, these three designations provide you with the knowledge you need to tackle challenges you will face throughout your career in benefits.



SAVE 20%
www.cebs.org

WITH A SUCCESS PACKAGE

Each package has the key elements you'll need to jump-start your CEBS journey—the textbook, Study Guide, Online Study Group and exam.

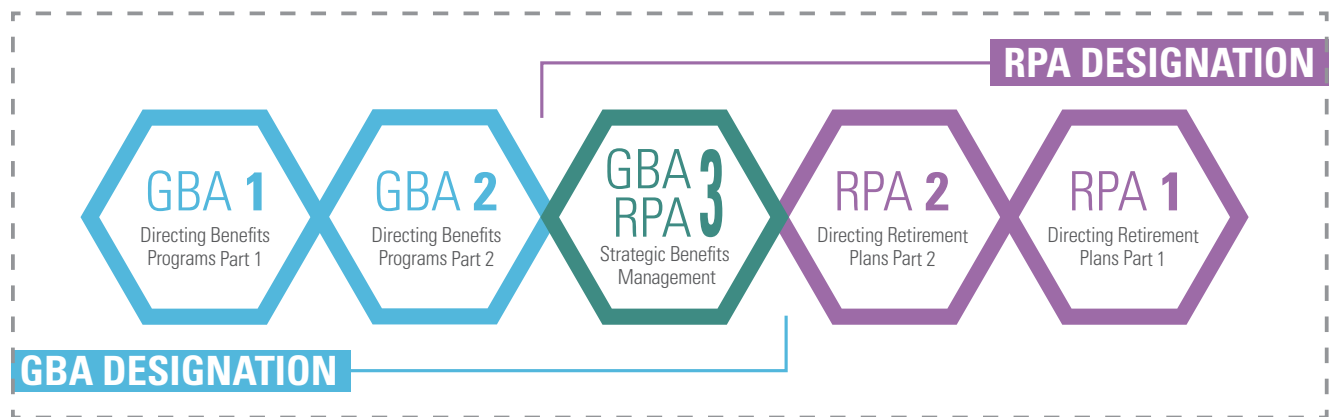


EMPLOYEE BENEFITS DESIGNATIONS

www.cebs.org

Enroll in the Certified Employee Benefit Specialist (CEBS) program and earn the most respected designation in the benefits industry. You'll learn from health and retirement curriculum—streamlined core courses, laser-focused content, and less breadth and more depth mean now you can learn more in less time. To earn the CEBS designation, all five courses must be successfully completed. The GBA or RPA designation can be earned by completing three courses described below.

CEBS Designation



Group Benefits Associate (GBA)

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

To earn the Group Benefits Associate designation, complete:

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

Retirement Plans Associate (RPA)

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

To earn the Retirement Plans Associate designation, complete:

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

ONLINE LEARNING

www.ifebp.org/online

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.



ONLINE CERTIFICATES

Complete a series of e-learning courses and gain a solid foundation of knowledge in a specific employee benefits discipline. When you're done, you will receive a Certificate of Achievement via email.



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.



VIRTUAL AND HYBRID CONFERENCES

Attend the International Foundation conferences you love from the comfort of your home or office.



ONLINE WORKSHOPS

Meet virtually with a subject matter expert and a small group of your peers for interactive training that you can immediately apply to your daily work.



WEBCASTS

Keep your finger on the pulse of current issues facing the benefits industry by accessing both live and recorded webcasts that are free to International Foundation members!

VIRTUAL CONFERENCES

www.ifebp.org/virtual



Women's Well-Being at Work

August 14, 2024 | Virtual Conference



Recognize the importance of women's well-being with this one-day, free virtual conference. These three sessions will cover the health, happiness and security of women at work. Experts will present data and trends while a panel of female leaders across industries will come together to react to, respond to and discuss the practical strategies that have helped them personally, in addition to the programs, policies and benefits that industry leaders use to keep women's health at the forefront. This event is co-sponsored by ISCEBS, NWI, WELCOA and the International Foundation.



Mental Health in the Workplace

October 9, 2024 | Virtual Conference



Organizations continue to face challenges with how to respond to their participants' mental health needs and foster a healthy work environment. This event will provide best practices for when, where and how employers can support the total well-being of their employees and their families. The Mental Health in the Workplace Virtual Conference is co-sponsored by ISCEBS, NWI, WELCOA and the International Foundation.



70th Annual Employee Benefits Conference

November 10-13, 2024 | Virtual Conference



Can't join us in San Diego this year? Participate virtually and get the same great educational content from experts who truly understand your day-to-day challenges. Expand your learning and rewrite what it means to be an exceptional trustee or administrator. Visit the vendor showcase to receive special offers, download resources, make appointments and more. Earn a certificate of attendance by watching at least 11 sessions (live or on demand).



Institute for Apprenticeship, Training and Education Programs

January 13-15, 2025 | Virtual Conference



Enjoy added flexibility through a virtual offering of the Institute for Apprenticeship, Training and Education Programs. This conference will address the current and relevant issues that are impacting your program, providing the clarity you need to plan for the future. Learn from experts and share ideas, opportunities and lessons learned with your peers so you return with actionable plans to implement.

Why You Should Attend:

- Learn best practices in managing your fund and running your training program
- Understand legal and regulatory requirements
- Discover strategies to avoid mistakes and reduce risks for your fund
- Take away best practices for succession planning and creating the next generation of leaders
- Learn more about mental health and substance use in your program

ONLINE CERTIFICATES

www.ifebp.org/onlinecertificates

FUNDAMENTALS IN HEALTH BENEFITS



Get up to speed on how and why an employer may sponsor a health plan for its employees and their beneficiaries. Required courses will outline the various ways to structure a group health plan as well as the many laws and regulations that impact them. Elective courses* explore plan funding and ancillary health benefits that plan sponsors may offer.

Required Courses

- Introduction to Group Health Plans
- Overview of Prescription Drugs

Elective Courses*

- Self-Funded Health Plan Basics
- Health Savings Accounts (HSAs)
- Workforce Wellness

FUNDAMENTALS IN RETIREMENT PLANS



Learn everything you need to know about designing and administering a compliant retirement plan. Courses will outline the different plan structures available, legal and regulatory requirements, contribution and distribution rules, as well as the unique responsibilities of various decision makers.

Required Courses

- Overview of Retirement Plans
- Retirement Plan Investments and Vendor Management

Elective Courses*

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

CERTIFICATE IN ABSENCE MANAGEMENT

For employers in any industry, the direct and indirect costs associated with employee absences can be staggering. Analyze the reasons employees miss work as well as how absenteeism and presenteeism affect organizational productivity. Then, learn how to design a comprehensive leave program for employees while maintaining compliance with the Family and Medical Leave Act (FMLA) and the Americans with Disabilities Act (ADA).



Required Courses

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

**Take one elective course to earn the certificate, but get access to all three and complete the remaining two courses if/when you want.*

ONLINE CERTIFICATES

www.ifebp.org/onlinecertificates

CERTIFICATE IN ERISA COMPLIANCE

For private employee health and welfare and retirement benefit plans, compliance with the Employee Retirement Income Security Act of 1974 (ERISA) is mandatory. Required courses will outline the general requirements of ERISA that all plans must follow as well as identify who is a fiduciary to the plan and what this role entails. Elective courses* drill down into how ERISA impacts group health plans, retirement plans, plan investing and vendor management.



Required Courses

- ERISA
- Fiduciary Responsibility for ERISA Plans

Elective Courses*

- Introduction to Group Health Plans
- Overview of Retirement Plans
- Retirement Plan Investments and Vendor Management

CERTIFICATE IN HEALTH PLAN NAVIGATION

Health care benefits are complex, and your plan participants look to you for the answers. If you are on the front line of health care enrollment at your organization, the Certificate in Health Plan Navigation is the education you need to better understand the health care system and support your plan participants in making the best health care choices.



Required Courses

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

**Take one elective course to earn the certificate, but get access to all three and complete the remaining two courses if/when you want.*

ONLINE CERTIFICATES

www.ifebp.org/onlinecertificates

CERTIFICATE IN MULTIEMPLOYER PLAN AUDITING

Multiemployer plans are a unique structure of benefit plans that can require special considerations for accounting and auditing issues. First, familiarize yourself with what multiemployer plans are, how they are meant to function and where legal problems can occur. Then, learn about accounting and auditing guidelines for multiemployer plans, including tax forms, financial processes, required financial statements and common multiemployer reporting issues.

Required Courses

- Multiemployer Plan Structure and Administration
- Multiemployer Plan Accounting and Auditing



CERTIFICATE IN SELF-FUNDING GROUP HEALTH PLANS

Employers that sponsor a group health plan for their employees may choose to self-fund the plan instead of purchasing health insurance. This means that the plan sponsor retains the financial risk and pays for all health claims out of specifically reserved funds or general business assets. The decision to self-fund is complex and involves strategic decision making regarding plan design, cost-containment strategies, whether to purchase stop-loss insurance and plan administration. Review these decision points in detail.

Required Courses

- Self-Funded Health Plan Basics
- Self-Funded Health Plans: Cost-Containment Strategies
- Self-Funded Health Plans: Understanding Stop-Loss Insurance
- Self-Funded Health Plans: Plan Administration



E-LEARNING COURSES

www.ifebp.org/elearning

E-learning courses can be taken individually or as part of an online certificate so you can get the exact training you need.



COBRA

Four-Credit Course

The Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) requires that most employer-sponsored group health plans must provide employees and their families the opportunity for a temporary extension of plan coverage in certain instances when that coverage would otherwise end. This course will explain the technicalities of COBRA, including who is entitled to COBRA, for how long and at what cost as well as how it must be administered.



Flexible Spending Accounts (FSAs)

Four-Credit Course

A flexible spending account (FSA) is an individual account that can reimburse an employee for qualified medical expenses and work-related child-care expenses. This course reviews the different types of FSAs, how employers can design these plans, compliance requirements, tax advantages, reimbursement rules, claims substantiation and other administrative considerations. Conclude this course by comparing FSAs to other employer-sponsored health accounts.



Health Care Cost and Quality

One-Credit Course

Plan participants can manage their health care expenses by using their health plan strategically, maintaining good health and seeking high-quality care. This course will review concepts such as balance billing for out-of-network care, claims and appeals, provider price and quality transparency, and programs to improve health and lower costs.



Health Care Delivery Models

One-Credit Course

Health care delivery is affected by the scope of the plan's provider network as well as the ways in which the participants can interact with the network. Health care delivery models are regularly evolving based on industry trends, economic and social pressures, and legislative mandates. This course will review how health care plans utilize various models for delivering care to participants.



Health Insurance Basics

One-Credit Course

Health insurance helps to minimize the financial impact of a person's medical costs by transferring some of the risk to the insurance provider. This course will review these cost-related concepts as well as introduce additional spending and savings options that can be used to pay for health care and supplies. The course will also provide information about federal laws that protect participants of group health plans.

E-LEARNING COURSES

www.ifebp.org/elearning



Health Literacy One-Credit Course

People who participate in group health plans will have different levels of health literacy, and the majority will have lower health literacy due to a variety of factors. This course defines health literacy and its various subsets and addresses how to evaluate a participant's health literacy aptitude. The course also provides a comprehensive overview of how to assist participants with low health literacy in any setting.



Health Reimbursement Arrangements (HRAs) Two-Credit Course

Employers interested in allowing employees to direct some of their own health care spending while still maintaining flexibility regarding plan design may consider offering an HRA. This course reviews HRA funding requirements, tax advantages, distribution options for qualifying medical expenses, claims substantiation and other administrative considerations. Conclude this course by comparing HRAs to other employer-sponsored health accounts.



Health Savings Accounts (HSAs) Three-Credit Course

HSAs are designed to pay for day-to-day qualified medical expenses on a tax-favored basis before health coverage provided through a high-deductible health plan (HDHP) begins. Learn about who can own and contribute to an HSA as well as contribution limits, distribution requirements and administration considerations. Conclude this course by comparing HSAs to other employer-sponsored health accounts.



HIPAA Privacy One-Credit Course

HIPAA violations are costly. How do you stay informed and compliant? This course provides comprehensive training on the latest HIPAA regulations for plan sponsors and business associates. Learn who and what are covered by the HIPAA Privacy Rule, how to properly disclose protected health information (PHI) and when the minimum necessary standards apply.



HIPAA Security One-Credit Course

Covered entities and business associates must comply with the HIPAA Security Rule. Learn administrative, physical and technical best-practice safeguards to have in place and how to document your compliance.



Introduction to Group Health Plans Four-Credit Course

Group health benefits play a key role in attracting and retaining your employees. Having trained staff who can effectively answer group health plan questions is essential. This course identifies the different plan funding options, outlines the evolution of managed care, reviews cost-containment strategies for group health plans, and addresses how plans must comply with federal and state laws.

E-LEARNING COURSES

www.ifebp.org/elearning



Overview of ACA One-Credit Course

This course offers an introductory look at the main components of ACA as well as how the law has changed over time. Learn about mandated benefits and plan design features that affect individuals as well as employer-sponsored group health plans, and discover how individuals and small employers can purchase health insurance through the ACA Marketplace and the Small Business Health Options Program (SHOP).



Overview of Disability Plans One-Credit Course

Learn more about various types of private and government-sponsored disability insurance plans as well as how to guide participants with disabilities through the process of choosing or utilizing coverage.



Overview of Exchanges One-Credit Course

Everything you need to know about the ACA-created online marketplace, also known as a *public exchange* in some states, is covered in this course. It will also define private exchanges and differentiate the types of health coverage currently available through each.



Overview of Prescription Drugs One-Credit Course

For most people, taking medication is a part of daily life, and prescription drug coverage provides an opportunity to obtain these drugs more affordably. Learn how people can gain access to prescription drug coverage, and define different types of drugs and how they may vary in price. This course will also review how various plan features can affect cost for plan participants and how participants can purchase necessary drugs using a plan.



Retiree Health Care Two-Credit Course

This course discusses the options for retiree health care. It provides information about Medicare benefits, eligibility and enrollment options. This course also addresses how employer-sponsored health care plans work with current employees over the age of 65 and provides clarification of long-term care.



Self-Funded Health Plan Basics One-Credit Course

Employers providing group health plans for their employees often choose to self-fund medical benefits instead of purchasing insurance. It is critical for plan sponsors to understand how these two approaches differ, how they are the same, and the pros and cons of each. This course provides a foundation for decision making, design and administration.

E-LEARNING COURSES

www.ifebp.org/elearning



Self-Funded Health Plans: Cost-Containment Strategies

Two-Credit Course

Gaining more control over health care costs is a priority for every health plan sponsor. Sponsors of self-funded plans often have more flexibility than sponsors of insured plans to customize and implement their preferred design and cost-management strategies. This course explains how data analytics and predictive modeling can point the way toward effective cost-containment strategies. It describes various plan designs and methods self-funded plan sponsors can use to deliver cost-effective health care benefits while achieving strategic goals.



Self-Funded Health Plans: Understanding Stop-Loss Insurance

One-Credit Course

Self-funded health plan sponsors often purchase stop-loss insurance for financial risk management. Stop-loss insurance protects plan sponsors from unexpected, costly medical claims that could jeopardize their core business. This course explains the types of stop-loss insurance available and what to know before purchasing and negotiating a policy. The course also describes captive arrangements that can be used along with stop-loss insurance for risk management.



Self-Funded Health Plans: Plan Administration

Three-Credit Course

Self-funded group health plan sponsors must give careful consideration to plan administration. This includes, but is not limited to, enrolling plan participants, collecting contributions, ensuring that funds are appropriately reserved and invested, processing claims, recordkeeping, communicating with plan participants and maintaining compliance with federal laws. This course provides a deep dive into the intricacies of these tasks, identifies the various types of service providers to whom the plan can outsource these duties, and describes how a plan sponsor can prudently select and monitor a vendor.



Workforce Wellness

Three-Credit Course

A workforce wellness initiative refers to the systematic efforts of an organization to enhance the wellness of its members through education, behavioral change and cultural support. Many employers support employee wellness because improved quality of life positively affects the overall productivity, health and stability of the workforce. This course describes how to design and administer an effective wellness initiative.

E-LEARNING COURSES

www.ifebp.org/elearning



401(k) Plans Four-Credit Course

The 401(k) plan has emerged as the primary retirement savings plan for many employees because of the tax advantages it provides. This course looks at many considerations for structuring and administering a compliant 401(k) plan, including employer and employee contributions, nondiscrimination testing, safe harbor protections, automatic enrollment and distributions.



Defined Benefit Plans Two-Credit Course

Learn about the defined benefit plan options available to plan sponsors, including the different pay- and service-related benefit formulas, plan funding responsibilities, investment decisions and risks, distribution methods and plan termination options.



Defined Contribution Plans One-Credit Course

A defined contribution plan offers flexibility to the plan sponsor and places all investment risk on the participant. Study how profit-sharing plans, employee stock ownership plans (ESOPs), money purchase pension plans, employer-sponsored IRAs, simplified employee pension (SEP) plans and Savings Incentive Match Plans for Employees (SIMPLE plans) provide different retirement savings options to employees.



Overview of Retirement Plans Three-Credit Course

Plan sponsors have many options when designing a retirement plan. Learn about the history and objectives of retirement plans, income sources in retirement, the role of plan sponsors, different plan structures available and how to educate employees. This course will also review Internal Revenue Code (IRC) and ERISA requirements that retirement plans must meet to qualify for tax advantages.



Retirement Plan Investments and Vendor Management Four-Credit Course

Meet all the key players involved in designing, administering and growing a retirement plan. Review the unique responsibilities of plan sponsors, trustees, fiduciaries, retirement plan committees, investment consultants and managers, actuaries, recordkeepers and third-party administrators (TPAs), and learn how to manage relationships with each of these groups.



Understanding Social Security Three-Credit Course

This course is designed to help both employers and individual workers understand eligibility requirements and funding processes in anticipation of applying for Social Security or Social Security Disability Insurance (SSDI).

E-LEARNING COURSES

www.ifebp.org/elearning



Americans with Disabilities Act (ADA)

Three-Credit Course

ADA provides a broad series of protections against discrimination for Americans with disabilities. This course goes into depth on Title I of ADA, which specifically provides protection from employment discrimination to qualified applicants and employees with disabilities.



ERISA

Four-Credit Course

Get the information you need to understand the requirements of the Employee Retirement Income Security Act of 1974 (ERISA), including types of plans covered, penalties, vesting requirements, fiduciary responsibilities, and reporting and disclosure requirements.



Family and Medical Leave Act (FMLA)

Four-Credit Course

The Family and Medical Leave Act (FMLA) is a federal law that serves to balance the demands of the workplace with the needs of families by protecting employees and employers when reasonable, approved military- and non-military-related leave is needed. This course covers how to recognize coverage and eligibility requirements of employees, identify the responsibilities of employers, deal with employee discipline and terminations in accordance with FMLA, avoid common administration mistakes, implement best practices and be aware of interactions with other laws.



Fiduciary Responsibility for ERISA Plans

Two-Credit Course

This course is designed to help fiduciaries understand their responsibilities and avoid penalties and personal liability. Reviewed topics include implications of co-fiduciary liability, delegation of duties, and the importance of establishing and following policies and procedures.



Leave Program Design and Administration

Four-Credit Course

Leave programs provide employees the opportunity to take time off from work as needed to refresh, vacation, resolve personal issues or address medical problems without the risk of losing their jobs. In some cases, leave is fully or partially paid, and other employee benefits continue uninterrupted. This course will review the various types of short- and long-term leave programs that employers can provide as well as best practices for designing and administering these benefits while maintaining compliance with federal, state and jurisdictional laws.

E-LEARNING COURSES

www.ifebp.org/elearning



Life and Accidental Death and Dismemberment (AD&D) Insurance

Two-Credit Course

The wide variety of life insurance products can make it difficult for employers to decide which types of coverage to offer employees. This course provides a solid understanding of life insurance options, business-oriented life policies, accidental death and dismemberment (AD&D) policies, and underwriting and eligibility requirements.



Managing Absence and Productivity Issues

Two-Credit Course

Each year, employers collectively lose billions of dollars due to employee absence. This includes time away from the office for health-related and non-health-related issues and disability leave as well as presenteeism and other distractors that decrease employee productivity on the job. This course addresses absence management strategies and other tools for driving employee productivity.



Multiemployer Plan Accounting and Auditing

Three-Credit Course

Because of their specialized structures, multiemployer plans have numerous differences and nuances to handling finances. These plans may have special reporting requirements, financial processes, financial statements, and other accounting and auditing issues. This can create difficulties for any accountant who is required to work on a multiemployer plan but is not familiar with how they function. This course provides high-level information for dealing with the accounting and auditing of multiemployer plans as well as points to additional resources and areas of inquiry.



Multiemployer Plan Structure and Administration

Two-Credit Course

Because they must combine the sponsorship and leadership of multiple companies as well as labor union representation, multiemployer benefit plans require a unique structure and administration. For anyone working with a multiemployer plan, it is essential to understand how these plans function and how their responsibilities are divided. This course will look at the basics of multiemployer plans, the people who guide plan decisions, basic plan regulations and the types of fraud that can occur in multiemployer plans.



E-learning courses qualify for CEBS Compliance credit.

The International Foundation has general preapproval from the Human Resource Certification Institute (HRCI) for PHR/SPHR/GPHR and the Society for Human Resource Management (SHRM) for SHRM-CP/SHRM-SCP recertification for most e-learning courses. In addition, courses are approved in many states for insurance licensure continuing education credit.

To see how you could earn credit, go to www.ifebp.org/elearningce.

REACH OUR MEMBERS

www.ifebp.org/exhibitsponsor

Many of the programs listed throughout this catalog offer opportunities for sponsors or exhibitors to connect with attendees. Join us to network with decision makers so you can nurture your customer relationships in person; secure high-quality leads; and showcase your brand, products and services.



EXHIBIT

Generate meaningful connections and drive business growth by exhibiting at one of the following conferences.

- Annual Employee Benefits Conference
- Annual Wellness Summit
- Art & Science of Health Promotion Conference
- CONNECT Global Employee Benefits and Workforce Strategies Summit
- Health Benefits Conference & Expo (HBCE)
- Trustees and Administrators Institutes



SPONSOR

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

- Annual Employee Benefits Conference
- Annual ISCEBS Employee Benefits Symposium
- Annual Wellness Summit
- Art & Science of Health Promotion Conference
- CONNECT Global Employee Benefits and Workforce Strategies Summit
- Fraud Prevention Institute for Employee Benefit Plans
- Health Benefits Conference & Expo (HBCE)
- Health Care Management Conference
- Institute for Apprenticeship, Training and Education Programs
- Investments Institute
- Trustees and Administrators Institutes



ADVERTISE

Promote your organization in our publications! Our niche audience consists of 30,000+ employer trustees, administrators and benefit plan professionals. Print and digital options are available.

- *Today's Headlines* is an e-newsletter delivered each day to 19,000+ members.
- *Benefits Magazine* is distributed bimonthly to 25,000+ Foundation members.
- Jobs in Benefits is a virtual hub where the best candidates and the best organizations can connect, infusing new talent and innovation into organizations across the industry.
- The Service Provider Directory is an online resource for employee benefits, compensation and human resources–related products and services.

INTERNATIONAL FOUNDATION MEMBERSHIP

www.ifebp.org/membership

The International Foundation covers trending topics, breaking compliance updates and legislative updates. Our resources will help you:



Legislative and Regulatory Updates

Find vetted, expertly curated updates out of Washington on issues impacting the employee benefits landscape.

Today's Headlines

Stay ahead of benefit regulations with daily compliance alerts, benefits news stories, and industry legislative and regulatory updates.



Jobs in Benefits/Career Resource Center

Find your next great hire, develop your career as a benefits professional, learn the latest trends in benefits and get an idea of salaries in your field.

Community

Chat directly with your peers, connect, share best practices and learn with other members who share your interests and concerns.



InfoQuick

Instantly access resources amongst over 100 frequently asked questions about industry topics, saving hours of searching time.

Sample Documents

Enough starting from scratch—View sample policies, forms, RFPs, checklists and other documents first.

Personalized Research Service

Save hours of time by letting one of our information specialists handle your complicated benefits questions.

Benchmarking Survey Reports

Access difficult-to-find details and benchmarking tactics to address the challenging benefits environment. Recent reports cover GLP-1 drug coverage, the four-day workweek, mental health and health care costs.



Webcasts

Gain just-in-time information on developing benefit issues, delivered by experts, with unlimited live and on-demand webcasts.

Benefits Magazine

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month.

Toolkits

Find expertly-curated resources on topics impacting you and your plans including DEI, mental health, financial education and retirement security, benefits communication and more.

CONTINUING EDUCATION

www.ifebp.org/ce

International Foundation programs and courses are regularly approved to fulfill continuing education (CE) requirements for professional licenses, certifications and designations.

Attorneys

For seminars and conferences, continuing legal education (CLE) can be earned in all states if the session is legal in content and substantial handouts are distributed at the session. The International Foundation seeks approval of seminars and conferences from state bar associations based on requests for CE credit on program registration forms. Credit for self-study courses is subject to individual state board regulations.

Certified Financial Planners

The International Foundation is a registered CE sponsor with the CFP® Board of Standards. CFP® designees are responsible for determining whether a program is appropriate and qualifies for CE credit. The International Foundation voluntarily submits its Annual Employee Benefits Conference for approval and distributes at that program a list of sessions preapproved for credit. For all other programs, the CFP® must determine qualification of the course to the CFP®-accepted subject topics.

Certified Public Accountants

The International Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of group-live continuing professional education (CPE) on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Whether credit can be earned for self-study courses would be subject to the individual state boards of accountancy regulations.

Enrolled Actuaries

The International Foundation is an accepted sponsor under Section 20, CFR Part 901(g)(2)(iii) of the final Rules and Regulations governing those enrolled to perform actuarial services under ERISA. The final decision as to applicable credit rests with the Joint Board for the Enrollment of Actuaries.

Credit Hours

Credit hours and filing procedures vary by discipline and from state to state. Please visit our website at www.ifebp.org/ce or contact the International Foundation Continuing Education Department for more information at (262) 786-6710, option 2, or continuinged@ifebp.org.



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

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

Insurance Producers

The International Foundation seeks approval of seminars and conferences from state insurance departments based on requests for CE credit on program registration forms. Approval of all programs is not automatically sought in all states. All state insurance departments require preapproval of programs for insurance CE credit. Most of the states require receipt of an approval request at least 90 days in advance of the program. It is important that insurance producers requesting CE credit register far enough in advance of the program that the requirement for advance approval can be met. The International Foundation self-study courses, including e-learning and CEBS courses, have been preapproved by multiple state insurance departments. Contact the Continuing Education Department for specific self-study approval information.

Human Resources Professionals

HRCI

International Foundation e-learning courses and some educational conferences are recognized for recertification credit hours toward PHR®, SPHR®, GPHR®, aPHR®, PHRca®, PHRi™ and SPHRi™ through the HR Certification Institute (HRCI).

SHRM

The International Foundation is recognized by the Society for Human Resource Management (SHRM) to offer professional development credits (PDCs) for the SHRM-CPSM or SHRM-SCPSM designations.

CEBS Compliance

To attain the status of CEBS Compliant, graduates need to report 30 hours of eligible activities during a two-year period. The chosen activity must cover one or more of the CEBS content domain topics, which can be found at www.cebs.org/compliance. CEBS graduates of the U.S. and Canada, of any year, are eligible to participate to attain this additional level of recognition. Most education programs sponsored by the International Foundation or the International Society of Certified Employee Benefit Specialists (ISCEBS) qualify for CEBS Compliance credit, including:



- Attendance at an International Foundation in-person conference
- Attendance at the ISCEBS Symposium
- CEBS courses not taken to originally earn the CEBS designation
- International Foundation webcasts or e-learning courses
- Attendance at an ISCEBS local chapter educational program.

GET INVOLVED

www.ifebp.org/getinvolved

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

Here's How You Can Increase Your Personal Involvement In the International Foundation:

ENGAGE

Connect With and Leverage Your Community—Share best practices and find solutions on the Foundation Community. You can also connect with colleagues, fellow members and information on Foundation social networks. Nowhere else will you find people who understand your challenges quite like this community does!

SHARE

Speak, Present, Author—Don't keep your knowledge to yourself! Help others in the trenches by sharing your ideas and thought leadership through authoring a magazine article or presenting a conference session or a webcast. You could also moderate a session or serve as a discussion leader.

LEAD

Serve on a Committee—Take an active part in developing products and services and charting courses of action for the International Foundation by volunteering at the Committee or Board level. Any member of the International Foundation can be nominated. Submit your information or nominate a colleague. We'd love to hear from you.



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