Trustees & Administrators Institutes

June 22-26, 2024
Caesars Palace | Las Vegas, Nevada

www.ifebp.org/trusteesadministrators

Main Conference

New Trustees Institute—
Level I: Core Concepts

Advanced Trustees and
Administrators Institute

Preconference Options

Understanding and
Engaging Today's Workforce

Trustees Institute—
Level II: Concepts in Practice

Concurrent Program

Accounting and Auditing Institute
for Employee Benefit Plans

International Foundation
OF EMPLOYEE BENEFIT PLANS

Trustees & Administrators Institutes

The **Trustees and Administrators Institutes** is offered each year in February and June. As one of the Foundation's longest running and most popular programs, the Institutes offers learning opportunities for **multiemployer** trustees, administrators and plan professionals at all levels. Choose the educational track and location that work for you.

There is one thing you can count on in these challenging times—the International Foundation's commitment to delivering timely, relevant and balanced education on the trends, issues and future direction of the industry that you need to succeed. Don't miss this time-honored educational event—**Register Today!**

The main conference runs June 24-26 in Las Vegas and offers two tracks:

(You may only register for one option, and there is no cross-attendance allowed between the two tracks.)

- **Advanced Trustees and Administrators Institute** covers hot topics in benefits and is designed for those who have three or more years of experience. See details on page 5.
- **New Trustees Institute—Level I: Core Concepts** is for trustees who are new to serving on a multiemployer trust fund, usually within the first three years of service. Trustees who have served for more than three years but have never attended a Foundation educational program will also benefit from New Trustees Institute—Level I. The course covers the key areas of responsibility in your role as a trustee. See details on page 13.

Preconference Educational Opportunities (separate registration required):

- **Trustees Institute—Level II: Concepts in Practice** will be offered on Saturday and Sunday, June 22-23, 2024. This course takes a deeper dive into the content covered in the Level I course. Having the Level II program on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. See details on page 16.
- **The Sunday preconference, Understanding and Engaging Today's Workforce,** is offered on June 23, 2024 from 8:00 a.m. to 1:00 p.m. For a full description of the Sunday preconference option, see page 18.

Concurrent Program

The **Accounting and Auditing Institute for Employee Benefit Plans** is co-located with the Trustees and Administrators Institutes. See page 22 for additional information.

Why You Should Attend

- Fulfill your fiduciary duty or obligation to your clients to be educated and informed on the important issues facing your fund, the employee benefits industry and your members.
- Interact with and learn from industry experts about the current state of affairs, trends and newest initiatives being implemented.
- Meet with industry vendors in the exhibit hall to explore new, innovative products and services that support your plan participants and improve your efficiency.
- Engage and network with peers to learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to consider.
- Bring home helpful resource materials to share with colleagues—from sample documents to checklists and case studies.

> "The depth of knowledge from such a diverse group of people made the experience invaluable, and I can't wait to go back now that I have an idea of what to expect."
>
> **AJ Sutton**
> Pacific Northwest Regional Council of Carpenters
> Fairbanks, Alaska

PROGRAM AT A GLANCE

PRECONFERENCES		
Saturday, June 22—8:00 a.m.-5:00 p.m. ***AND*** **Sunday, June 23**—8:00 a.m.-4:00 p.m.	Trustees Institute—Level II: Concepts in Practice	
Sunday, June 23—8:00 a.m.-1:00 p.m.	Understanding and Engaging Today's Workforce	
ADVANCED TRUSTEES AND ADMINISTRATORS INSTITUTE		
MONDAY | June 24, 2024		
7:30-8:45 a.m.	Economic Update	
9:00-10:15 a.m.	Legislative and Regulatory Update	
10:30-11:45 a.m.	Emerging Benefit Trends	Roundtable Discussion for Small Plans
1:15-2:30 p.m.	Fiduciary Responsibility—Advanced Issues	The Changing Service Provider Landscape
2:45-4:00 p.m.	Addressing Mental Health and Well-Being for Your Workforce and Participants	
TUESDAY | June 25, 2024		
7:30-8:45 a.m.	Managing Risk in Your Pension Fund	Administrators Roundtable
9:00-10:15 a.m.	Refresher on Collecting Employer Contributions	Addressing the Obesity Epidemic and Guideline-Based Benefit Design
10:30-11:45 a.m.	Hybrid Pension Plans	Emerging Trends in Rx Cost Management
1:15-2:30 p.m.	SECURE 2.0 Act	Reaching Employees With Suicide Prevention and Support Resources
2:45-4:00 p.m.	Advanced Withdrawal Liability	Crisis Management
WEDNESDAY | June 26, 2024		
7:30-8:45 a.m.	Cybersecurity	
9:00-10:15 a.m.	Next-Generation Tools to Enhance Your Communications	
10:30-11:45 a.m.	Artificial Intelligence—It's Here!	
NEW TRUSTEES INSTITUTE—LEVEL I: CORE CONCEPTS		
MONDAY | June 24, 2024		
7:30-11:30 a.m.	Trustee Responsibility and Legal Environment	
12:30-4:30 p.m.	Investing Health and Welfare and Pension Assets	
TUESDAY | June 25, 2024		
7:30-11:30 a.m.	Overview of Retirement Plans	
12:30-4:30 p.m.	Overview of Health and Welfare Plans	
WEDNESDAY | June 26, 2024		
7:30-11:30 a.m.	Governance	

Register Today! www.ifebp.org/trusteesadministrators

Main Conference

Advanced Trustees and Administrators Institute

June 24-26, 2024

The Advanced Trustees and Administrators Institute has a long-standing history of providing quality and relevant education to experienced multiemployer trustees and administrators. Register today to immerse yourself in the deeper issues and hot topics of today, and don't forget to take a look at the preconference options to round out your education.

While this conference is open to all, it is designed for multiemployer trustees and administrators who have served for over three years and have completed the Foundation's New Trustees Institute—Level I course. Plan professionals and service providers have also found value in attending to keep abreast of benefits issues, learn alongside clients and obtain continuing professional education.

Preconference Options—Many attendees of the Trustees and Administrators Institutes find value in attending one of the preconference options on Saturday and/or Sunday. See page 16 for the Trustees Institute—Level II course or page 18 for the Understanding and Engaging Today's Workforce workshop. A separate registration is required for either of the preconference options.

SUNDAY | June 23, 2024

7:00-8:00 a.m.

Preconference Registration

8:00 a.m.-1:00 p.m.

Preconference Workshop: Understanding and Engaging Today's Workforce

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

(Refreshments and light hors d'oeuvres will be served.)

MONDAY | June 24, 2024

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m.

Economic Update

With a presidential election looming, the severe impacts of climate change, and global political and economic uncertainty, navigating the next 12-18 months will require careful analysis and a steady hand. Understanding the economic environment both at home in the United States and abroad will help you manage your benefit plan investment assets. This session will review key economic indicators, market conditions and policy implications to give you the information you need to make prudent investment decisions.

Speaker:
Jack Manley
Executive Director,
Global Market Strategist,
J.P. Morgan
Asset Management,
New York, NY

9:00-10:15 a.m.

Legislative and Regulatory Update

This session will provide a legal and regulatory update for retirement and health plans, covering the topics of greatest importance at the time of the conference. You can also expect the session to cover:

- Legislative activity
- Status of recently enacted and proposed regulations
- Issues to watch in the 2024 election season
- Consolidated Appropriations Act compliance.

Sharon M. Goodman, Esq., Principal, Slevin & Hart, P.C., Washington, DC

10:30-11:45 a.m. | *concurrent sessions*

Emerging Benefit Trends

The benefits world is in a constant state of change, and it reflects what is happening in the workforce, in families and in our society. A panel of experts will share insights on the current and emerging benefits trends with a focus on:

- What survey data tells us
- Legislation driving trends
- Hot coverages: Student loan debt relief, LGBTQ, weight-loss drugs and telemedicine
- Implications for the future and your plans
- Coalitions.

Justin M. Held, CEBS, CEBS Compliant, Associate Director, Research & Education, International Foundation of Employee Benefit Plans, Brookfield, WI

Stephen J. O'Sick, CEBS, CEBS Compliant, Executive Director, New York Labor Health Care Alliance, Albany, NY

Aruna Vohra, Senior Consultant, Horizon Actuarial Services, LLC, Miami, FL

MONDAY | June 24, 2024 *(continued)*

10:30-11:45 a.m. | *concurrent sessions*

Roundtable Discussion for Small Plans

This session is designed for those who work with small plans. The session will feature a facilitated discussion about the unique challenges that small plans face and identify ideas and opportunities that can be considered given limited resources. Come to this session prepared to contribute to the dialogue and take away solutions to implement.

Daniela Janceski, CEBS, Plan Administrator, Ohio Conference of Teamsters and Industry Health and Welfare Fund, Toledo, OH

Karin A. Peters, President and Chief Executive Officer, National Employee Benefits Administrators, Inc. (NEBA), Pembroke Pines, FL

11:45 a.m.-1:15 p.m.

Lunch

Join us in the exhibit hall to network with your peers. Be sure to visit with our vendors who are bringing you valuable resources.

1:15-2:30 p.m. | *concurrent sessions*

Fiduciary Responsibility—Advanced Issues

Being a fiduciary sounds simple—Run the plan solely in the interest of participants and for the exclusive purpose of providing benefits and paying plan expenses. But we all know it goes much deeper. Dive into the more complex aspects of fiduciary responsibility as you consider:

- How the fiduciary role is expanding
- Unique legal cases with fiduciary implications
- Diversity in governance and among your professionals and service providers
- Complex issues including conflict of interest; service provider fees; two-hat dilemma; environmental, social and governance (ESG); functional fiduciaries; and delegation.

Daniel R. Brice, Esq., Partner and Co-Chair, Blitman & King LLP, Syracuse, NY

The Changing Service Provider Landscape

Your service providers and A-team are operating in a changing and dynamic marketplace that is impacted by venture capital, mergers and acquisitions, technology and changing consumer demand. This session will provide an overview of changes and consider the best practices. Topics include:

- Service provider fails—How to find them and what to do
- Movement in ownership of TPAs to hedge funds and what that means
- Health and retirement service provider changes
- Investment company mergers
- Best practices.

Lee M. Centrone, Senior Vice President, BeneSys, Portland, OR

David P. Dorsey, CPA, Partner, WithumSmith+Brown, PC, Bethesda, MD

Mary Ann T. Dunleavy, ASA, EA, MAAA, Senior Consulting Actuary, Horizon Actuarial Services, LLC, Silver Spring, MD

Travis J. Ketterman, GBA, Partner, McGann, Ketterman & Rioux, Chicago, IL

Stephanie Patrick, FSA, MAAA, Senior Consulting Actuary, Horizon Actuarial Services, LLC, Atlanta, GA

MONDAY | June 24, 2024 *(continued)*

2:45-4:00 p.m.

Addressing Mental Health and Well-Being for Your Workforce and Participants

One of the key ways to combat burnout is investing in well-being. Yet, implementing well-being initiatives faces several barriers such as cost, time, a lack of actionable data, and challenges faced by your dispersed worker and participant population. This session will help trustees and administrators design effective programs that combat escalating costs, improve well-being and even combat burnout. This session will address:

- Benefits of well-being initiatives and making the business case
- Well-being program design
- Broadening the scope of well-being
- Improving member engagement through communication initiatives.

Chase Sterling, M.A., CWP, Founder and CEO, Wellbeing Think Tank/HHP Cultures, Portland, OR

4:00-5:00 p.m.

Networking Reception/Exhibit Hall Open

Join us in the exhibit hall for refreshments and light hors d'oeuvres as you meet with our vendors and visit with your peers.

TUESDAY | June 25, 2024

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m. | *concurrent sessions*

Managing Risk in Your Pension Fund

Join in a conversation with an actuary and an investment consultant as they discuss managing risk in your pension fund. Consider how to evaluate your portfolio in today's high-interest, high-inflation environment. Take away a deeper understanding of the range of asset classes that may or may not be suitable for your situation. Revisit your investment policy statement for guidance today and in the future.

Robert M. Projansky, Esq., Partner, Proskauer Rose LLP, New York, NY

Jason L. Russell, EA, FSA, MAAA, Senior Vice President and Actuary, Segal, Washington, DC

Annie Taylor, CFA, Managing Director, Senior Consultant, Sector Lead, Verus, El Segundo, CA

TUESDAY | June 25, 2024 *(continued)*

7:30-8:45 a.m. | *concurrent sessions*

Administrators Roundtable

This is an opportunity for administrators to come together to discuss issues of importance. Come prepared to contribute and learn as you discuss issues, ideas and best practices. Potential topics may include operational efficiency, cybersecurity, compliance, staffing, internal controls and policies.

Andrea L. Gibbs, CEBS, ITIL, Assistant Vice President, National Employee Benefits Administrators, Inc. (NEBA), Memphis, TN

Ronald W. Laudel, Executive Director, Mid-America Carpenters Regional Benefit Services, Inc., St. Louis, MO

9:00-10:15 a.m. | *concurrent sessions*

Refresher on Collecting Employer Contributions

A robust collections program is key to the financial health of your fund. This session will refresh your knowledge of best practices in collections. Topics include:

- Understanding the players
- Policies and procedures
- Payroll auditing
- Collection committees
- Unique collection cases.

Philip R. O'Brien, Esq., Attorney-Shareholder, Employee Benefits, Reinhart Boerner Van Deuren s.c., Milwaukee, WI

Addressing the Obesity Epidemic and Guideline-Based Benefit Design

According to the CDC, more than one in three adults struggle with obesity, leading to higher risks of heart disease, type 2 diabetes and cancer. Health plans need a comprehensive approach to manage obesity to reduce costs and improve worker well-being. This session will cover:

- Understanding the complexities of weight regulation
- The impact of stigma/bias in management
- Addressing barriers to comprehensive care
- The organizational impacts on health, well-being and economic outcomes
- Evidenced-based approaches for medical management of obesity
- Potential health outcomes associated with weight reduction
- Understanding Rx options for obesity.

Craig Schmidt, Pharm.D., Medical Accounts Associate Director, Medical Affairs, Novo Nordisk Inc., Queens, NY

Register online at
www.**ifebp.org**/trusteesadministrators

TUESDAY | June 25, 2024 *(continued)*

10:30-11:45 a.m. | *concurrent sessions*

Hybrid Pension Plans

In recent years, much attention has been given to hybrid plans as a possible shared risk approach to a secure retirement. This session will help you understand how these plans work and some of the unique issues associated with implementation, including:

- What is a variable annuity plan?
- How do they work and what are the design and feature variations?
- Political and communication issues
- What happens in the bad years?
- Case studies.

Victor P. Harte, EA, MAAA, Principal and Consulting Actuary, Milliman Inc., Little Falls, NJ

Emerging Trends in Rx Cost Management

This session will explore the potential future of prescription drugs and highlight the issues and strategies to address positive outcomes while keeping costs in check. Topics include:

- Diabetes drug management and obesity drugs
- Impact of Rx legislation
- How artificial intelligence is being used in Rx
- Misaligned incentives and the pharmaceutical supply chain
- Specialty drug cost management
- Biosimilar and gene therapy update
- Medical specialty pharmacy
- Strategies to reign in pharmacy cost.

Randy G. DeFrehn, Chairman and Chief Executive Officer, DeFrehn and Associates LLC, Port Saint Lucie, FL

Louis Zollo, RPh, Vice President and National Pharmacy Practice Leader, Segal, New York, NY

11:45 a.m.-1:15 p.m.

Lunch

Join us in the exhibit hall to network with your peers. Be sure to visit with our vendors who are bringing you valuable resources.

1:15-2:30 p.m. | *concurrent sessions*

SECURE 2.0 Act

The SECURE 2.0 Act was passed in 2022 to incent and promote retirement savings. Trustees and administrators need to understand the key provisions of the legislation to be sure they are in compliance. This session will focus on:

- Overview of the SECURE Act from 2019 and the SECURE 2.0 Act
- Age requirements
- Annuities and RMDs
- Penalties
- Participant notices and plan reporting
- Overpayments.

Scott D. Newsom, Partner, Shumaker, Loop & Kendrick, LLP, Toledo, OH

TUESDAY | June 25, 2024 *(continued)*

1:15-2:30 p.m. | *concurrent sessions*

Reaching Employees With Suicide Prevention and Support Resources

The rate of suicide is now at its highest level since 1941, and suicide is a leading cause of death for those between ages 10 and 34. However, with risk identification and the right resources and support, many suicides can be prevented. In this session, we will explore how—across industries and roles—we have the ability to spot warning signs of someone in distress, and we have an opportunity to provide education about suicide prevention, connect individuals to appropriate interventions and improve our overall mental well-being. Topics include:

- The latest suicide trends and their impact on our communities
- Risk factors including health factors such as depression and substance use disorder, and environmental factors such as grief and other stressful events
- How employers can play an active role in supporting employees' mental and emotional health to prevent suicide
- Resources and interventions to reduce suicide.

Flora Vivaldo, M.S.W., Executive Director, Clinical Strategic Initiatives for Behavioral Health and Mental Well-Being, Aetna, a CVS Healthcare Company, Los Angeles, CA

2:45-4:00 p.m. | *concurrent sessions*

Advanced Withdrawal Liability

This session will help you understand the complex issues associated with withdrawal liability. It presumes a basic understanding of the topic as the session will feature a discussion on:

- Using separate assumptions for funding and withdrawal liability calculations
- Complete/partial withdrawal liability
- Trustee options
- Accounting and auditing issues (receivables)
- New PBGC regulations
- Court cases
- Legal issues.

James K. Estabrook, Esq., Shareholder, Lindabury, McCormick, Estabrook & Cooper, P.C., Westfield, NJ

Richard J. Hudson, FSA, FCA, MAAA, EA, Consulting Actuary, First Actuarial Consulting, Inc. (FACT), New York, NY

Crisis Management

Are you prepared for the next crisis? How would you protect your employees, your data, your physical assets, your clients and your reputation? A crisis management plan is a must-have in the world we live in. This session will address:

- Components of a crisis management plan
- Policies you should have
- Checklist of issues to consider
- Communications plan
- Training your leaders and team to execute.

Elizabeth E. Manzo, Esq., Shareholder, Lindabury, McCormick, Estabrook & Cooper, P.C., Westfield, NJ

Christopher J. Rosetti, CFE, CFF, CPA, Chief Operating Officer, New York State Nurses Association, Pension Plan and Benefits Fund, Albany, NY

WEDNESDAY | June 26, 2024

6:30-11:30 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m.

Cybersecurity

This session will focus on helping you understand what you should be doing with respect to cybersecurity, including:

- DOL guidance
- Assessment and penetration testing
- Dealing with a breach
- Insurance coverage and claims
- Third-party vendors to assess risk.

Mark E. Belland, Esq., Shareholder, O'Brien, Belland & Bushinsky, LLC, Moorestown, NJ

Christine (Tina) Fletcher, President, Ullico Casualty Group, LLC, Silver Spring, MD

9:00-10:15 a.m.

Next-Generation Tools to Enhance Your Communications

This session will consider how technology is impacting benefits and the tools available to plan sponsors and participants, including:

- Artificial intelligence
- Social media
- Devices, apps and interactive tools
- Self-service platforms
- Data analytics.

Joanna M. Pineda, Chief Executive Officer and Chief Troublemaker, Matrix Group International, Inc., Arlington, VA

10:30-11:45 a.m.

Artificial Intelligence—It's Here!

Close out your conference experience immersed in a discussion around artificial intelligence (AI). This session will consider how AI is impacting the economy, consumers and the job market. With a focus on the opportunities and challenges AI presents in the benefits world and in our daily lives, this session presents ideas to explore and consequences to look out for as this technology continues to expand.

Michael Stoyanovich, Vice President, Administration and Technology, Segal, San Francisco, CA

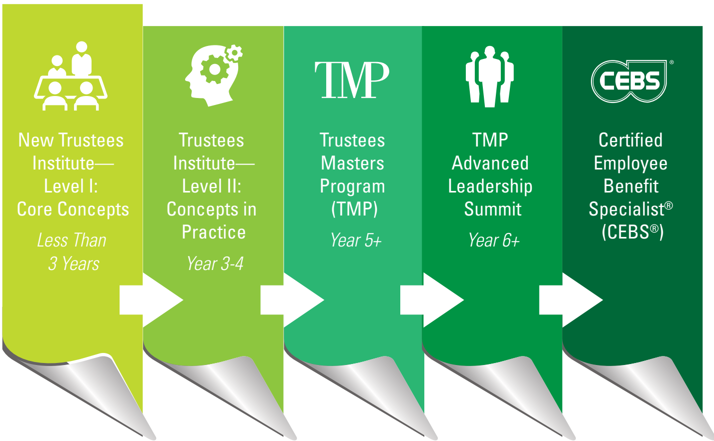
Main Conference

New Trustees Institute—Level I: Core Concepts

June 24-26, 2024

This course is for Taft-Hartley multiemployer benefit plan trustees who are new to serving on a multiemployer trust fund, usually within the first three years of service. Trustees who have served for three or more years who have not previously attended a Foundation educational program will similarly benefit from the New Trustees Institute. The content is also ideal for collective bargaining and others who work with trustees and want to better understand the role and function of multiemployer trustees. The course is comprised of five modules, each of which covers a key area of responsibility within your role as a trustee. Take away an understanding of the key issues in managing your pension, health and welfare and apprenticeship funds as well as the complexities of trust fund management and administration.

U.S. Multiemployer Trustee Path | www.ifebp.org/newtrustees



Note: New Trustees Institute—Level I is also offered each year as a preconference to the U.S. Annual Employee Benefits Conference. In 2024, the Institute will be held on November 9-11 in San Diego, California.

New Trustees Institute—Level I Faculty

Troy Brown
Partner
Executive Director of Consulting
AndCo Consulting

Kelly S. Coffing
Principal and Consulting Actuary
Milliman Inc.

Ian W. Jones
Senior Investment Consultant
AndCo Consulting

Robert M. Projansky, Esq.
Partner
Proskauer Rose LLP

Peter M. Rosene, Esq.
Shareholder
Reinhart Boerner Van Deuren s.c.

Dee Shaw
Health Benefit Consultant
Soshent Partners

Aaron Slaughter
Partner
WithumSmith+Brown, PC

Corey J. Wirth, CEBS
Executive Director
IBEW-NECA Service Center, Inc.

SUNDAY | June 23, 2024

7:30-8:00 a.m.

Preconference Registration

(for those who are registered)

8:00 a.m.-1:00 p.m.

Preconference Workshop: Understanding and Engaging Today's Workforce

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

(Refreshments and light hors d'oeuvres will be served.)

MONDAY | June 24, 2024

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-11:30 a.m.

Trustee Responsibility and Legal Environment

- History of benefits/legislation
- Governing documents
- Fiduciary responsibilities under ERISA
- Relationship of trustees and parties to the collective bargaining agreement
- Conducting effective trustee meetings

11:30 a.m.-12:30 p.m.

Lunch

Join us in the exhibit hall to network with your peers. Be sure to visit with our vendors who are bringing you valuable resources.

12:30-4:30 p.m.

Investing Health and Welfare and Pension Assets

- Investing process
- Investment terminology
- Risk and return
- Investment objectives and policy
- Asset classes
- Asset allocation
- Market performance
- Selecting managers and monitoring performance

4:30-5:00 p.m.

Networking Reception

(Refreshments and light hors d'oeuvres will be served.)

TUESDAY | June 25, 2024

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-11:30 a.m.

Overview of Retirement Plans

- Purpose and objectives
- Actuarial concepts
- Administration
- Manage the money
- Defined benefit pension plans
- Defined contribution and hybrid plans
- Accounting changes
- Market performance
- Legal and legislative developments
- The future of retirement

11:30 a.m.-12:30 p.m.

Lunch

Join us in the exhibit hall to network with your peers. Be sure to visit with our vendors who are bringing you valuable resources.

12:30-4:30 p.m.

Overview of Health and Welfare Plans

- Overview of health and welfare programs
- Plan funding
- Plan design
- Administration and financing metrics
- Communication needs and requirements
- Data collection and analysis
- Cost-control initiatives
- Health care reform, legal/legislative developments

WEDNESDAY | June 26, 2024

6:30-11:30 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-11:30 a.m.

Governance

- Financial statements
- Internal controls
- Administration
- Documents, records and meeting minutes
- Working with plan professionals
- Communication
- Best practices

Two-Day Preconference Course

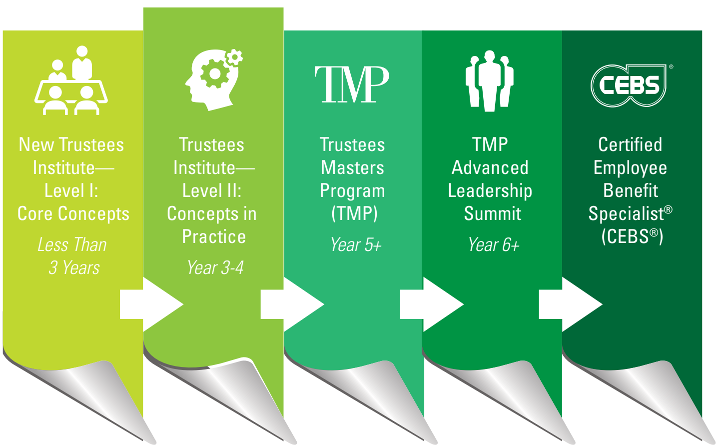
Trustees Institute—Level II: Concepts in Practice

June 22-23, 2024

Trustees Institute—Level II: Concepts in Practice is designed for Taft-Hartley multiemployer benefit plan trustees with three or more years of experience who have completed New Trustees Institute—Level I: Core Concepts. 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.

Having the Level II course on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. Please note that a separate registration is required to attend both the Level II course and the Advanced Trustees and Administrators Institute.

U.S. Multiemployer Trustee Path | www.ifebp.org/trusteeslevel2



Note: Trustees Institute—Level II is also offered each year as a preconference to the U.S. Annual Employee Benefits Conference. In 2024, the Institute will be held on November 9-10 in San Diego, California.

Trustees Institute—Level II Faculty

Lee Centrone
Senior Vice President
BeneSys

Kevin Culp
Senior Consulting Actuary
Horizon Actuarial Services, LLC

David P. Dorsey
Partner
WithumSmith+Brown, PC

Mary Ann T. Dunleavy
Senior Consulting Actuary
Horizon Actuarial Services, LLC

Michael D. Joyce, Esq., CEBS
Senior Vice President and Senior Investment Consultant
Segal Marco Advisors

Travis J. Ketterman
Partner
McGann, Ketterman & Rioux

Stephanie Patrick
Senior Consulting Actuary
Horizon Actuarial Services, LLC

Andrew E. Staab
Vice President and Senior Corporate Counsel
U.S. Bank National Association

Nick S. Trella
Senior Vice President/Principal
Segal Marco Advisors

SATURDAY | June 22, 2024

7:00 a.m.-5:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00 a.m.-12:15 p.m.

Governance/Administration

- Fiduciary duty
- Policies and procedures
- Group scenarios
- Prohibited transactions
- Deadlocks and arbitration
- Board governance
- Fraud prevention detection

12:15-1:00 p.m.

Lunch

1:00-5:00 p.m.

Investments

- Terminology and reports
- Who are the players? What are their roles?
- Asset allocation
- Other investment issues
- Alternative investment options
- Investment open forum

SUNDAY | June 23, 2024

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00-11:30 a.m.

Retirement

- Financial literacy
- DC plans/annuities
- Pension basics
- PPA-MPRA
- Plan redesign
- Withdrawal liability
- Open forum

11:30 a.m.-12:15 p.m.

Lunch

12:15-4:00 p.m.

Health Plans

- Health plan basics
- Appeals committee
- Prescriptions and mental health
- Monitoring and selecting service providers
- Rapid-fire Q&A
- Emerging issues

Trustees Institute—Level II Fees

Save $300 by registering before May 13.

Before May 13, 2024	Member: $1,695 | Nonmember: $2,025
After May 13, 2024	Member: $1,995 | Nonmember: $2,325

One-Day Preconference Workshop

Understanding and Engaging Today's Workforce

June 23, 2024
8:00 a.m.-1:00 p.m.

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. Nobody wants to work. Nobody wants to go to the office. We are clearly dealing with a different world as it relates to work—our own work and the work of others that 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
- Managing multigenerational issues
- Creating positive culture in the office and on the job site
- Supporting neurodivergent workers
- Harassment
- HR policies
- Communication
- Do your benefits benefit your participants?
- Understanding your workforce
- Building a strategy for change.

Speaker:
Lauri Rollings
CEO
Lauri Rollings and Associates, LLC
Milwaukee, Wisconsin

Preconference Fee

Save $150 by registering before May 13.

Before May 13, 2024	Member: $525 | Nonmember: $635
After May 13, 2024	Member: $675 | Nonmember: $785

Hotel

Caesars Palace

Las Vegas, Nevada
June 22-26, 2024

The Trustees and Administrators Institutes will be held at Caesars Palace in Las Vegas, Nevada.

Caesars Palace, located on the iconic Las Vegas Strip, is a sprawling resort and casino renowned for its opulent Roman-themed architecture and entertainment offerings. Boasting a rich history since its opening in 1966, it has become a landmark destination for visitors seeking a vibrant and diverse experience. With its numerous dining options, world-class entertainment venues and expansive gaming floor, staying at Caesars Palace offers unparalleled access to the excitement and variety of Las Vegas, making it an ideal choice for those looking to immerse themselves in the heart of the city's entertainment scene.

Reservation Deadline: May 13, 2024
Rate: $129 single/double occupancy
Taxes & Fees (subject to change):
Room Tax—13.38%
Resort Fee—Reduced resort fee of $10/night (standard resort fee is $49.95/night)
Resort fee includes (subject to change):

- Two guest admissions per day to the Fitness Center (does not include the use of the spa)
- Upgraded, premium in-room internet access for up to two devices per room per day.

Hotel Cancellation Policy: Hotel deposit forfeited for reservations canceled within 72 hours prior to arrival.

You will be charged a $400 deposit upon registration. Please specify your hotel requirements on the registration form.

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

Exhibit Opportunities

Do you have a service provider that could benefit from exhibiting at or sponsoring the Trustees and Administrators Institutes? Or do you offer a product or service that could be beneficial to trustees and administrators supporting multiemployer and public sector benefit plans? Valuable exhibitor and sponsorship opportunities are available at the June Institutes.

Contact Us!

For Exhibits
Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

For Sponsorships
Diane Mahler | (262) 373-7656 | dianem@ifebp.org

75%

of attendees at the Trustees and Administrators Institutes **do not** attend the Annual Conference, exposing you to a new audience.

Benefits of Exhibiting at the Trustees and Administrators Institutes

The exhibit hall at the Trustees and Administrators Institutes is structured specifically to build valuable connections with attendees. As an exhibitor, you will:

- Reach a concentrated audience of over 400 trustees, administrators and plan professionals who serve multiemployer benefit plans
- Build relationships among those who do not attend the Annual Conference (75% of attendees at the Institutes do not attend the Annual Conference)
- Secure quality leads—Attendees at the Institutes are decision makers who can directly impact your bottom line
- Learn about the issues impacting your clients today by participating in educational sessions and networking with peers.

Each Exhibit Space Includes:

- Two complimentary registrations
- 6' draped table
- Contour chairs
- Wastebaskets
- Company listing on the conference app
- Exhibitor recognition on website.

Reception, continental breakfast and lunches are served in the exhibit hall. There are limited spaces available!

Come Visit With Us!

The International Foundation of Employee Benefit Plans will have a booth at this year's June Trustees and Administrators Institutes. Our on-site experts are here to answer any questions and talk with you about additional educational opportunities that are right for you.

Ready to Learn More? *Request a **2024 Exhibitor Prospectus** for full details.* Contact Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Sponsorship Opportunities

Benefits of Sponsoring the Trustees and Administrators Institutes

Sponsorship opportunities are designed to give you maximum value for your dollar before, during and even after the conference. As a sponsor, you will:

- Expand your brand recognition among a valuable audience who can increase your business revenue
- Gain a competitive advantage by meeting with attendees in person, answering their questions and hearing about the issues of greatest concern to them
- Receive exposure on our website and in preconference promotions, on-site signage, program materials and more!

Platinum Sponsorship

Exclusive Specialty-Conference Lanyards for a Year

SOLD

Opportunity for one organization to sponsor attendee lanyards used at specialty conferences within the year (does not include HBCE, Annual Conference or Symposium). Request a sponsor brochure for more details.

Gold Sponsorships

Three options to choose from:

Attendee Lunch

Exclusive Conference App

SOLD

Your company logo appears on splash screen each time attendees open the app.

Lunch and app sponsorship include one complimentary, plus one discounted, conference registration

Specialty-Conference Bundle Discount

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

Includes one complimentary conference registration at each sponsored conference

Silver Sponsorship

Continental Breakfast

Includes one complimentary conference registration

Bronze Sponsorship

Refreshment Break

Includes one conference registration at a 50% discount

Ready to Learn More? *Request a* ***2024 U.S. Sponsor Opportunities*** *brochure for full details.* Contact Diane Mahler | (262) 373-7656 | dianem@ifebp.org

Accounting and Auditing Institute for Employee Benefit Plans

June 24-26, 2024 | Caesars Palace | Las Vegas, Nevada
Virtual option available

Having the Trustees and Administrators Institutes and Accounting and Auditing Institute co-located in Las Vegas provides the opportunity for members in your organization to connect and network with other plan professionals, trustees and fund administrators. Encourage the accounting professional on your fund to attend and stay up to date on the latest reporting and disclosure requirements and best practices in the accounting and auditing profession.

The program offers focused learning on the technical topics of greatest concern to the accounting and auditing profession. Learn best practices, interact with other professionals who face similar issues and fulfill your need for continuing professional education.

Sessions Included:

- Economic Update*
- DOL Update
- Audits of the Future
- Dueling Auditors
- Payroll Auditing
- Best Practices in Audit Quality
- Unique Audit Areas for Health and Welfare Plans
- What Actuarial Reports Mean to Auditors: Working With Actuaries
- Fund Office Accountants—How to Make Your Audit Easier
- Better Communication Makes for a Better Audit
- Roundtable Discussion for Those Who Work With Small to Medium Firms/Fund Offices
- Roundtable Discussion for Those Who Work With Medium to Large Firms/Fund Offices
- Cybersecurity—Where Are You Looking and What Are You Seeing?
- Guided Open Forum
- Artificial Intelligence—It's Here!*

Benefits of Attending

- 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.
- Take the opportunity to earn meaningful continuing professional education (CPE) credits.

Learn more at www.ifebp.org/accountants

*Joint session with Advanced Trustees and Administrators Institute

REGISTRATION

Go to **www.ifebp.org/trusteesadministrators** to register.

CONFERENCE REGISTRATION FEES

Advanced Trustees and Administrators Institute and New Trustees—Level I Fees

Save $300 by registering before May 13.

Before May 13, 2024	After May 13, 2024
Member: $1,695 | Nonmember: $2,025	Member: $1,995 | Nonmember: $2,325

Separate registration for the preconferences is required.

Two-Day Preconference Course:

Trustees Institute—Level II Fees

Save $300 by registering before May 13.

Before May 13, 2024	After May 13, 2024
Member: $1,695 | Nonmember: $2,025	Member: $1,995 | Nonmember: $2,325

Sunday Preconference Workshop

Save $150 by registering before May 13.

Before May 13, 2024	After May 13, 2024
Member: $525 | Nonmember: $635	Member: $675 | Nonmember: $785

POLICIES

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

CONTINUING EDUCATION CREDIT

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

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2.

CEBS COMPLIANCE APPROVED

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

INTERNATIONAL FOUNDATION MISSION

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

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International Foundation OF EMPLOYEE BENEFIT PLANS

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