

# 2024

## Membership Handbook

### **We Can't Wait to Help!**

This guide outlines membership resources to help you stay compliant and create the best pensions and benefits offerings for your organization.

# **YOUR PENSIONS AND BENEFITS COMMUNITY**

# You Are Part of Something BIG

The Foundation serves over 31,000 members like you throughout Canada and the United States, including:

- Trustees and administrators from multi-employer trust funds
- Benefits, compensation and human resources leaders from the private sector
- Public employee plan managers, administrators and trustees
- Service providers, including lawyers, actuaries, accountants, and others who work with benefit and compensation plans.

The Foundation depends on collaborative efforts between Canadian and U.S. board and committee volunteers, staff and members to stay ahead of industry issues and needs.

Over 180 trustees, administrators and benefits professionals serve within the volunteer Foundation board and committee structure and contribute their expertise to develop educational program content and other services.

**6,700**

Organizations



**31,000**

Individual members



**25 million**

Individuals across Canada and U.S. impacted by the reach of International Foundation members

## 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.

**LET US  
HELP YOU...**

# Stay Compliant

Stay ahead with pensions and benefits news stories and industry updates with the members-only **TODAY'S HEADLINES** email.

Be the first to know about updates on budget, benefits, employment, insurance, labour, health and pensions, and provincial/territorial legislation resources with the **CANADIAN LEGISLATIVE SCORECARD**. You'll also receive alerts covering these topics through *Today's Headlines*.

pension funding

mental health

pension registration guidelines

flexible schedules

adoption assistance benefits

infectious disease emergency leave

surrogacy benefits

employment contracts

pension plan statement  
of investment

fertility treatment benefits

policies and procedures

pay equity

financial wellness

pay transparency

paid time off

overtime pay

sick leave

# Save Time

Save time by heading to the **BENEFITS KNOWLEDGE CENTER**. There you will be able to:

1. Let one of our information specialists handle your complicated benefits questions by using the **PERSONALIZED RESEARCH SERVICE**.
2. Avoid starting from scratch by viewing sample policies, forms, checklists and other documents in the **SAMPLE DOCUMENTS** section.
3. Instantly access articles and webpages addressing over 100 frequently asked questions about industry topics, saving hours of searching time, with **INFOQUICK**.

## Questions our members have requested personalized research on lately:

1. Do you have information about a total rewards strategy in Canada? I'm looking for benchmarking data or articles.
2. I'm looking for information on a typical range of annual per employee spend on employee events for mid- to large-sized companies.
3. I want to ensure we are following Canadian law when it comes to any required leave for a death in the family.

Visit [www.ifebp.org/benefitsknowledgecenter](http://www.ifebp.org/benefitsknowledgecenter) to learn more.



# Make Connections

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 through **JOBS IN BENEFITS**. Visit [www.ifebp.org/JobsInBenefits](http://www.ifebp.org/JobsInBenefits) to explore more.

Talk directly with your peers and learn how they are taking action on similar issues, or keep an eye on the conversation to learn best practices through the **FOUNDATION COMMUNITY**.

Find out what other employers are doing and easily compare your benefit offerings through niche **BENCHMARKING DATA**. View recent reports and findings at [www.ifebp.org/research](http://www.ifebp.org/research).



## Join the Foundation Community discussion group(s) vital to your role.

- Plan Sponsors (U.S.)
- Service Providers
- Global Benefits
- Canada

## Sign Up

1. Visit [www.ifebp.org/myprofile](http://www.ifebp.org/myprofile). Sign in.
2. Click "My Community" in the "Manage My Communications" tab.
3. Check the box for the group(s) you'd like to join.

# Learn From the Experts

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month. Read the next **PLANS & TRUSTS** issue at [www.ifebp.org/magazines](http://www.ifebp.org/magazines), or wait until it arrives in your mailbox!



Gain just-in-time information on developing benefit issues, delivered by experts through unlimited live and on-demand **WEBCASTS**. Visit [www.ifebp.org/webcasts](http://www.ifebp.org/webcasts) for a full listing.

## RECENT WEBCASTS INCLUDE:



The Impact of Chronic Tiredness on the Workplace



The Four-Day Workweek—  
A Real Option for Employers or Hype?



Decumulation:  
Unique Challenges and Solutions for Members

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



# Extra Perks

Receive **DISCOUNTS** on conferences, courses and online education. You'll notice a special member price on nearly every educational event offered.

Get quick, curated information on hot topics impacting our industry with new, member-exclusive **TOOLKITS**. Dig deeper into topics like DEI, mental health, benefits communication and more.

## READ ON

Word on Benefits® Blog: [ifebp.org/blog](https://ifebp.org/blog)

- Decumulation Challenges and Solutions for Plan Members: Three Takeaways
- The Four-Day Workweek—A Real Option for Employers or Hype?
- Could ChatGPT Be Used in Employee Benefits?
- Trauma in Organizations: Mental Health
- Supporting Women in the Workplace



# RESOURCES BY TOPIC

# Resources by Topic

Find more support on topics impacting you and your plans.



**Canadian Legislative Scorecard**



**Pension Legislative Update**



**Regulatory Updates**



**Paid Sick Leave**

**Not finding what  
you're looking for?**

*Let our benefits information  
experts search for  
what you need.*

**Call:** (833) 886-3749, option 5

**Email:** [infocenter@ifebp.org](mailto:infocenter@ifebp.org)



# QUESTIONS & ANSWERS

**Q:** How do I access my member benefits online?

**A:** Many member benefits are available online with exclusive member access to areas of our website on [www.ifebp.org](http://www.ifebp.org). If you forget your username and/or password, recover/change it by using the log-in page, [www.ifebp.org/login](http://www.ifebp.org/login).

**Q:** If my organization purchased the individual membership for me and I leave the company, will I be able to take the membership with me?

**A:** When an organization pays for a membership, the organization is entitled to replace you if it wishes. Please call (833) 886-3749 to discuss your options for remaining a member.

**Q:** If my organization has an individual membership, can it be upgraded to an organizational membership at any time?

**A:** Absolutely. Contact us at (833) 886-3749 and any membership assistant will be happy to help you upgrade your membership.

**Q:** Now that I am a member of the International Foundation, am I automatically enrolled in the CEBS program or ISCEBS?

**A:** The Certified Employee Benefit Specialist® (CEBS®) program is a designation program that is offered by the International Foundation. Starting the CEBS program is a separate process; membership in the Foundation is not required. The International Society of Certified Employee Benefit Specialists (ISCEBS) is a different membership offered to CEBS, CMS, GBA and RPA graduates and also to current CEBS students.

**Q:** What are my responsibilities as the primary contact for an organizational membership?

**A:** As the primary contact, you will receive annually the dues renewal invoice for the next calendar year. Included with the dues renewal will be the membership roster. The roster is a listing that shows your organization and contact information, followed by names of the active individuals. Be sure to contact us with any updates to the roster throughout the year.

**Q:** Can a nonmember serve as a primary contact for an organizational membership?

**A:** Yes. It is not required that the primary contact be an active member. You can designate any employee from your organization to handle your membership.

**Q:** Can two multi-employer trust fund boards be represented on one membership?

**A:** Separate memberships are to be taken out for funds that do not have identical boards. Members on a trust fund membership must work solely for the fund.

**Q:** If the membership is a multi-employer or public employee trust fund and is administered by a third-party administrator, can the representative from that organization be listed as an active member on the fund's membership? In addition, can the fund's lawyer be listed as an active member on the fund's membership?

**A:** For trust fund memberships, the administrator or lawyer must work solely for the fund. The third-party administrator or lawyer will need to take out a separate membership for their own organization.

**Q:** If we have a trust fund membership, can we add to our membership a trustee from another fund who is not an active member?

**A:** Often funds do not have identical boards of trustees for their various plans. If this is the case, a separate membership would need to be taken out for each fund.

**Q:** Is there a preferred way to get a roster update or other written requests to the International Foundation?

**A:** There are a few options to update an organization's roster. The primary contact should include the organization membership number on all correspondence.

1. Use the "My Profile" area of our website at [www.ifebp.org/myprofile](http://www.ifebp.org/myprofile). The primary contact should use their individual ID, not the group ID, to access the roster.
2. Mail the roster to:  
International Foundation of Employee Benefit Plans  
Attn: Membership Dept.  
P.O. Box 2506  
Postal Station A  
Toronto, ON M5W2K6 Canada

**If a roster is not available:**

Email a request to [membership@ifebp.org](mailto:membership@ifebp.org).

**Q:** When I replace an individual on the roster with a new person, does the new person adopt the removed person's individual membership number?

**A:** No. The new person will be assigned a new number and will keep this number when moving to another company and becoming a member again in the future. An individual's membership number "travels" with the individual.

**Q:** Are we able to add to our membership a colleague who works with our company or fund but is not employed by us?

**A:** A colleague who works with your company or fund who is not employed by your company or fund will need to take out a separate membership for their own organization.

**Q:** Can I wait until dues are reduced each year instead of renewing at the full dues rate?

**A:** Reduced rates apply to new memberships only. If your membership expired more than 12 months ago, you are now eligible to rejoin at promotional rates as a new member.

# Customize Your Membership Experience

Review Your Profile Today

Make sure you are signed up to receive only the International Foundation communications you want by reviewing your profile. Information provided is kept strictly confidential.

Visit [www.ifebp.org/myprofile](http://www.ifebp.org/myprofile) to get started!

