70TH ANNUAL EMPLOYEE BENEFITS CONFERENCE

November 10-13, 2024
San Diego Convention Center | San Diego, California

VIRTUAL SESSIONS

International Foundation
OF EMPLOYEE BENEFIT PLANS

SUNDAY | 4:30-6:00 p.m.

A OPENING SESSION—History Lessons From Epic Presidential Races

Jon Meacham, Presidential Historian and Pulitzer Prize–Winning Author

(guests welcome)

Jon Meacham is a presidential historian and Pulitzer Prize–winning author. He is a contributor to *TIME* and the *New York Times Book Review* as well as a highly sought-after commentator, regularly appearing on MSNBC, CNN and other news outlets. Meacham is a distinguished visiting professor at Vanderbilt University where he holds the Rogers Chair in the American Presidency.

Only available to view live. A recording will not be available to watch later.

MONDAY | 7:30-8:45 a.m.

B KEYNOTE SESSION—The AI-Powered Organization

Mike Walsh, Global Nomad, Futurist and Best-Selling Author

Mike Walsh is the CEO of Tomorrow, a global consultancy on designing companies for the 21st century. For the past twenty years, he has been a leading authority on disruptive innovation, digital transformation and new ways of thinking. A global nomad from a diverse ethnic background, futurist and author of three best-selling books, Mike advises some of the world's biggest organizations on reinvention and change in this new era of machine intelligence.

MONDAY | 9:15-10:15 a.m.

G01 (NT) FEATURED SESSION—DOL Update

Lisa M. Gomez, United States Department of Labor

Join the Department of Labor's EBSA assistant secretary Lisa Gomez as she discusses the trends and hot topics in employee benefit plan regulation.

I04-1 (NT) (P) Working With Your Investment Professionals

Marc R. Fischer, CIMA, Graystone Consulting

Michael A. Ledbetter, CEBS, Ledbetter Partners LLC

- How to get more out of conversations
- Reading the reports from your consultant and fund managers
- Understanding your consultants and their role
- Understanding investment managers and their role

P04-1 (NT) (P) Pension Plan Actuarial Basics for the Nonactuary

Alice Alsberghe, ASA, EA, MAAA, Cheiron, Inc.

Jake Libauskas, FSA, EA, MAAA, FCA, Cheiron, Inc.

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

PE2 (P) Public Sector Plans: Money Managers in Defined Contribution Plans

Robert Whited II, CFA, CEBS, Creative Planning Retirement Services

- Who is providing members with education and advice?
- Investment manager fees
- Duty of plan trustees to monitor participant experience with outside advice
- Member experience with retirement plans
  - Pension, 403(b) and 457 plans

Administration	Fiduciary Responsibility	
General Topics	Health and Welfare	
Investments	Pensions	Public Plans

Program Content

All

Basic

NT Recommended for New Trustees

P Recommended for Public Plans

MONDAY | 10:45-11:45 a.m.

F01 Fiduciary Responsibility Basics

John E. Schembari, Esq., Kutak Rock LLP

- Understanding your obligations
  - Financial oversight
  - Benefit payments
  - Collections of contributions and withdrawal liability
  - Securing data and privacy
- Trust fund business vs. union business
- Familiarity with fund policies and procedures
- What duties can or should be delegated?
- What are your responsibilities for reporting to participants?

G04-1 Communicating With Plan Participants

Jennifer S. Abrams, Esq., Susanin, Widman & Brennan, PC
Joanna M. Pineda, Matrix Group International, Inc.

- Evolving your plan communication efforts
  - Self-service
  - Use of AI
- Identifying best practices
- Communicating plan value
- Legal considerations

H22 FEATURED SESSION—Addressing Substance Use in the Trades

Tramaine EL-Amin, M.A., Mental Health First Aid USA, National Council for Mental Wellbeing

- Evaluating population risk and prevalence through data
- Interventions
- Peer support models
- EAP/MAP
- Recovery-friendly workplaces
- Evidence-based interventions

Recordings of sessions, **with the exception of opening keynote**, will be available until Friday, December 13, 2024 for your learning convenience. Recordings are posted to the virtual environment within 24 hours.

Administration	Fiduciary Responsibility	
General Topics	Health and Welfare	
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MONDAY | 1:15-2:15 p.m.

F02 Best Practices in Trustee Processes and Oversight

NT

Craig A. Bitman, Morgan, Lewis & Bockius LLP

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

H02-1 Health Care Legal and Legislative Update

NT

Kathryn L. Bakich, Segal

Elena Lynett, J.D., Segal

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

- No Surprises Act
- Inflation Reduction Act
- PBM litigation.

P08-1 Effectively Communicating Your Retirement Plans

NT P

Breanna L. Radtke, Mid-America Carpenters Regional Council Benefit Funds

Heidi E. tenBroek, Milliman, Inc.

- Methods of communicating
- Importance of financial literacy
- Building a model of education
  - Goals of the plan
  - Planning for the future
- Appropriate messages for participants, employers, trustees and administrators

PE3 Artificial Intelligence—A Futurist Perspective for Public Sector Plans

P

David Levine, Groom Law Group, Chartered

- Risks and opportunities
- Vendors
- Theoretical vs. practical

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MONDAY | 2:45-3:45 p.m.

A04 Best Practices for Today's Self-Administered Fund Office

Nicola (Nick) Favorito, North Atlantic States (NAS) Carpenters Benefit Funds
Ronald W. Laudel, Mid-America Carpenters Regional Benefit Services, Inc.
Susan Loconto Penta, MIDIOR Consulting, Inc.

This session will provide an "operations map" takeaway that management teams can use as a template to implement at their own fund office.

- HR considerations
- Recruiting and retaining staff, succession planning
- Onboarding and training
- Legal and regulatory issues
- Cybersecurity and privacy

G10-1 Worker Recruitment and Retention Update

James E. Blau, CEBS, CFA, United Food and Commercial Workers (UFCW) International Union
Andie Gebert, CPTD, International Foundation of Employee Benefit Plans
Sandy Pope, Office and Professional Employees International Union (OPEIU)
Saná Walker, SHRM-CP, HR Girlfriends

Join this session to hear from a panel on how their recruitment and retention strategies have adapted over the last two years with new collective bargaining agreements, wage increases and benefit enhancements.

H11-1 Prescription Drug Pipeline Update

P

Harold Carter, Pharm.D., Express Scripts

- What's coming down the pipeline
- Specialty drug update
- GLP-1 update
- Biosimilars, formularies and other cost-containment strategies
- Inflation Reduction Act implications

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TUESDAY | 7:30-8:45 a.m.

C

KEYNOTE SESSION—Economic Update

Marci Rossell, Expert Economic Forecaster, Former CNBC Chief Economist and Co-Host of SQUAWK BOX

Marci Rossell is a world-renowned economist and financial expert who electrifies audiences nationwide, speaking candidly on the nexus of economics, politics, culture and the media. She honed her animated style serving as the popular, lively chief economist for CNBC, where she became a household name and a must-watch source of financial news. The former co-host of the well-known "pre-market" morning news and talk show Squawk Box, Rossell is revered for taking complex economic issues, often dull in the button-down business press, and making them relevant to people's lives, families and careers.

TUESDAY | 9:15-10:15 a.m.

F05-1

NT

Trustee Expenses—In Depth

Travis J. Ketterman, GBA, McGann, Ketterman & Rioux

Aaron Slaughter, CPA, Withum

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

H04-1

P

Stop-Loss Coverage—Understanding Your Options

Hans F. Kraabel, CEBS, REBC, CPC, CFP, United Actuarial Services, Inc.

- What is stop-loss insurance?
- Selecting the appropriate coverage levels
- Reviewing and understanding contract terms
- How to utilize stop-loss effectively
- Adverse selection considerations
- Pharmacy considerations

I21-1

NT

Proxy Voting—Updated DOL Regulations

Michael T. Joliat, Reinhart Boerner Van Deuren s.c.

Maureen O'Brien, Segal Marco Advisors

- What is proxy voting?
- What kinds of investments involve proxy voting?
- What is a trustee's fiduciary responsibility for proxy votes?
- Updates to DOL regulations and action items for trustees

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TUESDAY | 10:45-11:45 a.m.

G14-1 Mental Health and Nontraditional Benefits—Meeting Evolving Participant Needs

P

Nikole Benders-Hadi, M.D., Talkspace
Lana M. Saal, Ed.D., MCHES, CTTS, CWP, NBC-HWC, The VitHealthity Group

This session will provide an in-depth exploration of innovative and inclusive employee benefits that cater to diverse family structures and personal needs. By focusing on mental health benefits, LGBTQ+ support and other nontraditional benefits, organizations can enhance employee satisfaction, retention and overall well-being. Join us to learn best practices, implementation strategies and the positive impacts these benefits can have on your workforce.

H12-1 Coverage for GLP-1 Drugs—Where Are We Now?

P

AJ Ally, R.Ph., M.B.A., Milliman, Inc.
Michael P. Brady, Laborers' Local 157 Benefit Funds

- Current state of coverage for diabetes care
- Current state of the industry in obesity drug coverage
- Utilization trends and their impact on benefit plans
- Cost and safety considerations
- The role of prescription therapies as part of a total health approach

P18 SECURE 2.0 Act Update—2024 and Beyond

P

Steven E. Grieb, J.D., CEBS Compliant, Gallagher Fiduciary Advisors, LLC

- Roth catch-up contributions
- Increase in annual catch-up contribution limit
- Long-term part-time employee eligibility
- Required minimum distributions
- Creation of portability registry

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TUESDAY | 1:15-2:15 p.m.

A06 — Leadership Skills for a Healthy Workplace

P

Chase Sterling, M.A., CWP, Wellbeing Think Tank/HHP Cultures

- Promoting empathy and psychological safety
- Setting boundaries and establishing norms
- Understanding the relationship between connectedness and well-being

F07 — Understanding Your Financial Statements and Budgeting

NT

Jeffrey L. Goss, CPA, Miller Kaplan Arase LLP

- Terminology
- How to read the plan financial statement
- Understanding internal controls
- Creating and following a budget for the plan/trust

I07-2 — Total Plan and Investment Manager Benchmarking

NT P

Michael D. Joyce, Esq., CEBS, Segal Marco Advisors

- DOL audit perspective
- Proper benchmarking used by investment managers
- Total plan benchmarks
  - Defined benefit plans
  - Defined contribution plans
  - Health and welfare

P01-2 — Legal and Legislative Update for Retirement Plans

NT

Meredith B. Golfo, Esq., Slevin & Hart, P.C.

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

TUESDAY | 2:45-3:45 p.m.

H07 — Retiree Health Care—Options for Your Participants

John P. Dulczak, RetireeFirst and LaborFirst

- Options for covering pre- and post-Medicare retirees
- Group pre-Medicare and Group Medicare Advantage plans
- Pros and cons for retirees and plan sponsors
- Inflation Reduction Act implications

P07-2 — Conversation With the PBGC

Emily Allender, Pension Benefits Guaranty Corporation

Hear from the Pension Benefit Guaranty Corporation (PBGC) about its biggest concerns, recent initiatives and outlook for the future.

PE9 — Public Sector Recruitment Challenges

P

Dan Doonan, National Institute on Retirement Security (NIRS)
Laura J. Earley, CEBS, CEBS Compliant, AssuredPartners
Ronald Krupa, CEBS, CEBS Compliant, GPHR, WTW
Shaun C. O'Brien, American Federation of State, County and Municipal Employees (AFSCME)

- National trends in recruiting for public sector jobs
- Identifying highly valued benefits
- Coordinating benefits and recruitment strategies
- Addressing the reputation of public sector benefits
- Revisiting prior benefit changes (e.g., pensions) and currently available plans

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WEDNESDAY | 7:30-8:30 a.m.

F04-2 NT

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

Ruth S. Marcott, Kutak Rock LLP
Kevin J. McCaffrey, CEBS, Teamsters Local 707

Examine real-life scenarios that demonstrate the fine line between outside interests and the interests of the participants.

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

P17-2 P

Challenges Facing Defined Contribution Plans

José M. Jara, Fox Rothschild LLP
William Schories, CIMA, AIF, CRPS, Invesco

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

WEDNESDAY | 9:00-10:00 a.m.

H26-2 P

Advancements in Cancer

Adam Bradley, CancerNavigator
Megan P. Hall, Ph.D., GRAIL

- Insights into how cancer uniquely impacts unions and their members
- Overview of scientific advances, clinical data and cutting-edge technology
- Case study—Examples of success

I19-2 P

Artificial Intelligence in Investing

Michael Stoyanovich, Segal

- Tools for investment consultants
- How managers may be using artificial intelligence (AI) in the portfolio
- Quantitative investment strategies
- How can you use AI for your fund?

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