

# 70TH ANNUAL EMPLOYEE BENEFITS CONFERENCE

Attend  
in person or  
virtually!

**November 10-13, 2024**

San Diego Convention Center | San Diego, California

In-person Preconference: November 9-10



# 70TH ANNUAL EMPLOYEE BENEFITS CONFERENCE

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San Diego, California

## Connect. Collaborate. Learn.

**Connect** with over 5,000 other colleagues who understand your day-to-day challenges and the complicated issues you continue to face.

**Collaborate** and find solutions by striking up a conversation in the lunch line or between sessions with fellow attendees.

**Learn** a variety of new information and advanced solutions from over 120 sessions that will help you in solving key issues on your plate.



**Can't attend in San Diego?**

### **VIRTUAL OPTION AVAILABLE**

Over 30 sessions will be presented online, allowing attendees the flexibility of viewing each session live or on demand through December 13, 2024. Certificates of attendance will still be offered to those who participate virtually and meet the session requirements. Continuing education credit for professional licenses and designations is **ONLY** available to those who attend the conference in San Diego.

# Building Your Case for Attending

The odds might seem stacked against you in getting approval or buy-in to take valuable time away to attend a conference. The Annual conference is like no other—centered on education and your fiduciary duty. Here are four discussion points to help you sell your participation or the participation of your trustees in this time-honored event

1

## THREE DAYS OF VENDOR-FREE EDUCATION

The annual conference provides three days full of learning with over 120 sessions from over 200 experts. These sessions contain valuable need to know information without a sales pitch. Sessions range from basic to advanced, but all provide key takeaways and action items you can implement immediately. The content is organized into ten focused tracks, allowing you to easily pick the sessions you need regardless of your role or experience level to create a customized conference experience.

2

## CERTIFICATE OF ATTENDANCE IS AVAILABLE

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

3

## GREAT INVESTMENT

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

4

## MORE THAN JUST INFORMATION

Attending the Annual Conference provides you with more than just the vital information you need. Registration includes opportunities to meet your peers from around the country during lunch, morning refreshment breaks and shuttle bus rides each day. Attendees will also gain access to four world-renowned keynote presenters and an exhibit hall full of service providers who have the answers you are looking for.



# Conference Schedule

## Friday, November 8

**Registration Open** ..... 12:00 noon-5:00 p.m.

**Hospitality Hub Open** ..... 12:00 noon-5:00 p.m.

## Saturday, November 9

**Registration Open** ..... 7:00 a.m.-5:00 p.m.

**Hospitality Hub Open** ..... 7:00 a.m.-5:00 p.m.

**Preconference Programs** ..... 8:00 a.m.-5:00 p.m.

## Sunday, November 10

**Registration Open** ..... 7:00 a.m.-5:00 p.m.

**Preconference Programs** ..... 8:00 a.m.-4:00 p.m.

**Exhibit Hall Open\*** ..... 12:00 noon-4:30 p.m.

**Hospitality Hub Open** ..... 12:00 noon-4:30 p.m.

**Opening Session\*** ..... 4:30-6:00 p.m.

**Welcome Reception in Exhibit Hall\*** .... 6:00-7:00 p.m.

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

## Monday, November 11

**Registration Open** ..... 6:30 a.m.-4:00 p.m.

**Hospitality Hub Open** ..... 7:00 a.m.-4:00 p.m.

**Breakout Sessions** ..... 7:30 a.m.-3:45 p.m.

**Exhibit Hall Open** ..... 10:00 a.m.-3:00 p.m.

**Lunch in Exhibit Hall** ..... 11:45 a.m.-1:15 p.m.

## Tuesday, November 12

**Registration Open** ..... 6:30 a.m.-4:00 p.m.

**Hospitality Hub Open** ..... 7:00 a.m.-4:00 p.m.

**Breakout Sessions** ..... 7:30 a.m.-3:45 p.m.

**Exhibit Hall Open** ..... 10:00 a.m.-3:00 p.m.

**Lunch in Exhibit Hall** ..... 11:45 a.m.-1:15 p.m.

## Wednesday, November 13

**Registration Open** ..... 6:30-11:00 a.m.

**Hospitality Hub Open** ..... 7:00-11:00 a.m.

**Breakout Sessions** ..... 7:30-10:00 a.m.

**Finale Session\*** ..... 10:30-11:30 a.m.

*\*Guests are welcome to attend.*

*Note: Exhibit hall is open to guests on Sunday only.*

*All times are subject to change.*

## Securing a Certificate of Attendance

A certificate of attendance will be issued to registrants whose attendance can be verified at 11 or more sessions of the main conference, beginning with the opening keynote session on Sunday. Be sure to have your badge scanned as you exit each session you attend to ensure you are meeting these requirements.

## Earning Continuing Education Credit

Attending sessions at the Annual Conference in San Diego can offer continuing education (CE) credit hours for numerous designations and licenses. The International Foundation seeks approval based on requests received on conference registration forms at least 90 days in advance. Visit [www.ifebp.org/annualce](http://www.ifebp.org/annualce) to learn more. CE will **ONLY** be available for those attending in person and will not be available with the virtual conference option. CE Certificates will be mailed six weeks after the conclusion of the conference.



# Recommended Preconferences

Arrive early and extend your learning by attending a preconference.

## TAFT-HARTLEY TRUSTEES

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

### RECOMMENDED PRECONFERENCES:

- New Trustees Institute—Level I: Core Concepts (for newer trustees)
- Trustees Institute—Level II: Concepts in Practice (3+ years of experience)
- Trustees Masters Program (TMP) (5+ years of experience)
- TMP Advanced Leadership Summit (must be a TMP graduate)

## PUBLIC SECTOR TRUSTEES AND SUPPORT STAFF

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

### RECOMMENDED PRECONFERENCES:

- Certificate of Achievement in Public Plan Policy (CAPPP®): Pensions Part II or Health Part II
- Trustees Masters Program (TMP) (5+ years of experience)
- TMP Advanced Leadership Summit (must be a TMP graduate)

## EVERYONE

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

### RECOMMENDED ENRICHMENT PRECONFERENCE:

- Health, Wealth and Happiness—Planning Your Path to a Successful Retirement
- Cybersecurity and Social Engineering Fraud
- Mental Health First Aid®
- Overcoming Bias in the Workplace
- A Way With Words—How to Say What You Mean to Get What You Want
- Attorneys Only—Ethics and Diversity in Employee Benefits





# Preconference Options

Arrive early and extend your learning by attending a preconference.

**2½-Day**  
Workshop

## **New Trustees Institute—Level I: Core Concepts**

*For Newer Trustees*

Saturday, November 9 | 8:00 a.m.-5:00 p.m.

Sunday, November 10 | 8:00 a.m.-4:00 p.m.

Monday, November 11 | 9:15 a.m.-12:15 p.m.

**REGISTRATION CODE: 24N8**

Designed for Taft-Hartley trustees who have served for less than two years or who have not previously attended an International Foundation educational program. The New Trustees Institute is ideal for collective bargaining and other personnel who work with trustees and would like a better understanding of their role and responsibilities. Learn from the Institute's highly rated faculty.

**Two-Day**  
Workshop

## **Trustees Institute—Level II: Concepts in Practice**

*For Trustees With 3+ Years of Experience*

Saturday, November 9 | 8:00 a.m.-5:00 p.m.

Sunday, November 10 | 8:00 a.m.-4:00 p.m.

**REGISTRATION CODE: 24N9**

This program explores how the concepts introduced in Level I apply to trust fund management, digging deeper into each area so trustees gain more confidence in their knowledge. Those completing Level II will have a greater understanding of their fiduciary responsibilities and a firmer overall grasp of trust fund management. Prior attendance at New Trustees Institute—Level I: Core Concepts is strongly encouraged.

**Two-Day**  
Workshop

## **Trustees Masters Program (TMP)**

*For Trustees With 5+ Years of Experience*

Saturday, November 9 | 8:00 a.m.-4:00 p.m.

Sunday, November 10 | 8:00 a.m.-4:00 p.m.

**REGISTRATION CODE: 24D2**

The Trustees Masters Program (TMP) is for serious-minded trustees who want to think and act more boldly, systematically and proactively. The curriculum builds on trustees' existing knowledge base and experience through peer exchange and group exercises over an intense two days.

The program is divided into two tiers to help further facilitate your ongoing education and recognition. Tier one (Saturday and Sunday classes) is required for course completion and to receive a Certificate of Achievement. Those who also attend tier two (candidate classes) will receive their TMP pin.

*If you have already completed this program, consider the  
TMP Advanced Leadership Summit on Sunday, November 10.*

# Preconference Options

## One-Day Workshop

### **TMP Advanced Leadership Summit**

*For TMP Graduates Only*

Sunday Only, November 10 | 8:00 a.m.-3:00 p.m.

**REGISTRATION CODE: 24D3**

The TMP Advanced Leadership Summit is an exclusive program for trustees who have earned the TMP Certificate of Attendance and commemorative pin. The Summit offers an opportunity to further examine relevant topics critical to a fund's overall strategy. The topic focus of the TMP Advanced Leadership Summit changes each year to reflect the most essential issues facing trustees today. Attendance at the Summit will count for two sessions toward the main conference certificate of attendance.

*Note: Registration is limited; register early.*

## Two-Day Workshop

### **Certificate of Achievement in Public Plan Policy (CAPPP): Health Part II**

Saturday, November 9 | 8:00 a.m.-5:00 p.m.

Sunday, November 10 | 8:00 a.m.-4:00 p.m.

**REGISTRATION CODE: 2418H**

An essential program for new trustees and those seeking a refresher in public sector benefit plans, the CAPPP program addresses the core concepts and current trends in health plans, plan design and fiduciary aspects of public sector benefit plans. This exam-based program is led by industry practitioners and experts in the field.

*Note: Limited seats are offered for this program.*

## Two-Day Workshop

### **Certificate of Achievement in Public Plan Policy (CAPPP): Pensions Part II**

Saturday, November 9 | 8:00 a.m.-5:00 p.m.

Sunday, November 10 | 8:00 a.m.-4:00 p.m.

**REGISTRATION CODE: 2418P**

An essential program for new public sector trustees working with pensions, this program addresses the fundamental areas involved in managing 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.

*Note: Limited seats are offered for this program.*

**Interested in attending?**

Visit [www.ifebp.org/usannualprecons](http://www.ifebp.org/usannualprecons) to register for a preconference.

# Preconference Options

## Financial Planning Workshop

**Two-Day**  
Program

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

Saturday and Sunday, November 9-10 | 8:00 a.m.-1:00 p.m.

**REGISTRATION CODE: Attendee only PC53**

**Attendee plus spouse/guest PC55**

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

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





# One-Day Enrichment Workshops— Attend One or Both Days!

Enrichment Workshops are \$525 per day through September 30, 2024 and \$675 per day after September 30 for members.

## Cybersecurity and Social Engineering Fraud

Saturday, November 9 | 8:00 a.m.-1:00 p.m.

**REGISTRATION CODE: PC01**

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

## Mental Health First Aid®

Saturday, November 9 | 8:00 a.m.-1:00 p.m.

**REGISTRATION CODE: PC03**

Sunday, November 10 | 8:00 a.m.-1:00 p.m.

**REGISTRATION CODE: PC04**

Mental Health First Aid® (MHFA) at Work is a high-impact, skills-based training program that teaches workers how to offer help to a person who may be developing or is suffering from a mental health concern or crisis. Attendees will be introduced to the unique challenges and needs of the individual who may experience the symptoms of mental illness.

- Identify the impact of mental health challenges and recovery on the well-being of adults in the workplace.
- Explain and practice the five-step MHFA action plan (ALGEE).
- Discuss appropriate methods of self-care for individuals in the workplace.

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

## Overcoming Bias in the Workplace

Saturday, November 9 | 8:00 a.m.-1:00 p.m.

**REGISTRATION CODE: PC05**

In this timely, powerful and highly interactive training, we'll look at how team members can reduce unconscious bias, and we'll explore the many ways that we can change our practices (such as hiring and promotions) to minimize the impact of cognitive bias and create a culture in which everyone can grow and succeed.

# One-Day Enrichment Workshops— Attend One or Both Days!

## Attorneys Only—Ethics and Diversity in Employee Benefits

Sunday, November 10 | 8:00 a.m.-1:00 p.m.

### REGISTRATION CODE: PC02

Join us for continuing legal education credits in ethics and diversity, inclusion and the elimination of bias training for benefit attorneys. Be sure to include your CLE request on the registration form with your state and BAR license number.

## A Way With Words—How to Say What You Mean to Get What You Want

Sunday, November 10 | 8:00 a.m.-1:00 p.m.

### REGISTRATION CODE: PC06

The ability to connect with those around us and powerfully and positively communicate wants and needs is a differentiator in today's world of increasing isolation and separation. Gain confidence to enter into any meeting or conversation knowing you have the knowledge and tools to be heard and received in the way you intended and to be a positive influence with your teams, colleagues and superiors.



# Overview of Select Sessions

For 70 years, the Annual Conference has been the go-to place for multiemployer and public employee benefit plan representatives to gain the essential, time-sensitive information and resources to make informed decisions in the best interests of their plan participants.

## ADMINISTRATION

Managing a trust fund involves a million moving parts, and keeping everything running smoothly is a daily challenge. Take away valuable ideas from these sessions for overseeing the funds you manage while understanding your responsibilities with all the moving parts.

- Administrators Town Hall
- Administrator's Guide to Onboarding New Trustees
- An Administrator's Guide to Collections and Payroll Auditing
- Data Automation and Office Efficiency
- Leadership Skills for a Healthy Workplace

## FIDUCIARY RESPONSIBILITY

Learn how to stay ahead of challenges so you can make the best decisions for your plan participants and act in the best interest of those you serve.

- Fiduciary Responsibility Basics
- Best Practices in Trustee Processes and Oversight
- Understanding the Fiduciary Duty of Appointing a Multiemployer Trustee
- Wearing the Right Hat at the Right Time—The Two-Hat Dilemma
- Trustee Expenses—In Depth

## GENERAL

Gain a broader overview of employee benefits—related topics and challenges, such as specialty benefits, cybersecurity, fraud and more. These sessions will prepare you to take on the complicated landscape with a better understanding of how even small changes can positively affect your plans.

- DOL Update
- Fiduciary Education, International Foundation Member Benefits and Getting Involved
- Cybersecurity Update—Where Are We Now?
- Practical Uses for AI in the Fund Office
- Addressing Loneliness at Work

# Overview of Select Sessions

## HEALTH AND WELFARE

Explore the latest issues, trends and solutions in the health care arena, including mental health. Sessions will provide you with valuable insight on how to effectively navigate the costs impacting your plan.

- Demystifying Your PBM Contract
- Health Plans 101—Terminology for New Trustees
- Whose Kid Is This? And Other Good Reasons to Conduct Dependent Eligibility Audits
- Coverage for GLP-1 Drugs—Where Are We Now?
- Overcoming Barriers to Care
- Emerging Mental Health Treatment Options

## INVESTMENTS

Uncover opportunities, trends and alternative strategies to enhance your fund's investments. Gain the knowledge needed to make important decisions that ensure your fund's financial longevity.

- Investments: A Fiduciary Primer
- Investing for Health and Welfare, Apprenticeship Plans
- Investing in America's Future Infrastructure
- What If (Investment) History Repeats Itself? Looking Back to the Future
- Proxy Voting—Updated DOL Regulations

## PENSIONS AND RETIREMENT

Offering and administering a pension plan comes with unique challenges and responsibilities. Sessions focus on understanding all aspects of a pension plan, including plan design, investing funds and legislative changes.

- Pension Plan Actuarial Basics for the Non-Actuary
- Dueling Pension Actuaries
- Defined Contribution Plan Risk—Options to Minimize and Mitigate
- The Impact of Non-Investment Risks on Your Pension Plan
- A Survey of the Retirement Landscape
- Suspension of Benefits Retirement Plan Rules and Workforce Needs



# Overview of Select Sessions

## PUBLIC PLANS

Learn how to effectively navigate public plan operation while finding solutions to satisfy the unique needs and challenges public plans are facing in today's political environment.

- Artificial Intelligence—A Futurist Perspective for Public Sector Plans
- Public Sector Paid Family Leave Issues
- Ensuring Public Employee Health Benefits Are Inclusive
- Public Sector Recruitment Challenges

## APPRENTICESHIP, TRAINING AND EDUCATION

The rise in apprenticeship programs has caused a great need for education. Topics will cover running an apprenticeship program and trust fund, emphasizing solutions to fit the unique issues that apprenticeship programs face.

- DOL Audits of Apprenticeship Funds
- Operational Policies for Your Apprenticeship-Training Fund
- Innovative Outreach—Best Practices for Apprenticeship Funds
- Improving Jobsite Awareness

## FUND PROFESSIONALS—ACCOUNTANTS

These sessions are designed for those who provide accounting services to multiemployer and public trust funds—Discover the latest trends, updates and information in this landscape.

- Accountants: Best Practices in Audit Quality
- Accountants: The Future for the Audit Professional
- Accountants: Intersection of Internal Controls and Cybersecurity

## FUND ADVISORS—ATTORNEYS

These sessions are designed for those who provide legal counsel to multiemployer and public trust funds—Explore the issues and concerns that your clients will need your guidance on.

- Attorneys: Ethical Considerations
- Attorneys: Employment Discrimination in Employee Benefits
- Attorneys: The State of the Law on Prohibited Transactions

**Don't forget to register for the attorney-only preconference on Sunday offering CLE in Ethics and Diversity. See above for details.**



# Do You Have an Exceptional Service Provider You Want to Share?

Encourage your service provider to exhibit at or sponsor the Annual Conference! Various options are available to fit any budget, and each offers an exceptional opportunity to build business and brand awareness.

## WHY EXHIBIT AND SPONSOR?

- Get premium, face-to-face access to our decision-maker attendees who represent over a billion dollars in fund assets.
- Have the opportunity to meet with existing clients, build on relationships and stand out from the competition by learning about key issues concerning and impacting their members and customers.
- Join 200+ exhibitors and sponsors who are already building their business with Foundation members.

### To learn more, contact us today!

#### Exhibits:

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

#### Sponsorships:

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



# Hotel Information

Visit [www.ifebp.org/SanDiegoHotels](http://www.ifebp.org/SanDiegoHotels) for hotel details.

The International Foundation has negotiated discounted rates for conference attendees at the San Diego hotels noted below. Reservations must be booked through the International Foundation to receive this discounted rate. Please call the Registration Department at (888) 334-3327, option 2 to be placed on a waitlist.

- 1 Embassy Suites by San Diego Bay Downtown**   
IF Block 250 | \$279 single/double
- 2 Hard Rock Hotel San Diego** **WAITLIST**  
IF Block 250 | \$309 single/double
- 3 Hilton San Diego Airport/Harbor Island\***   
IF Block 100 | \$249 single/double
- 4 Hilton San Diego Bayfront\*** **WAITLIST**  
IF Block 1,000 | \$316 single/double
- 5 Hilton San Diego Gaslamp Quarter** **WAITLIST**  
IF Block 150 | \$315 single/double
- 6 Hotel no longer available**
- 7 Hotel Indigo San Diego-Gaslamp Quarter**  
IF Block 100 | \$286 single/double
- 8 Hotel Republic San Diego, Autograph Collection\***   
IF Block 150 | \$279 single/double
- 9 InterContinental San Diego\***   
IF Block 200 | \$307 single/double
- 10 Manchester Grand Hyatt San Diego** **LIMITED**  
IF Block 650 | \$309 single/double
- 11 Margaritaville Hotel San Diego Gaslamp Quarter** **LIMITED**  
IF Block 100 | \$286 single/double
- 12 Marriott Marquis San Diego Marina** **WAITLIST**  
IF Block 500 | \$321 single/double
- 13 Omni San Diego Hotel** **WAITLIST**  
IF Block 350 | \$305 single/double
- 14 San Diego Marriott Gaslamp Quarter** **LIMITED**  
IF Block 200 | \$315 single/double
- 15 Sheraton San Diego Hotel & Marina\***   
IF Block 200 | \$264 single/double
- 16 Hotel no longer available**
- 17 The Westin San Diego Gaslamp Quarter\***   
IF Block 300 | \$289 single/double
- 18 AC Hotel San Diego Downtown Gaslamp Quarter**   
IF Block 50 | \$289 single/double (King only)
- 19 Andaz San Diego**   
IF Block 60 | \$305 single/double
- 20 Pendry San Diego**  
IF Block 240 | \$307 single/double

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



 **Shuttles will be provided to these hotels.**

**Cancellation Policy:**  
Cancel fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations received within three days of arrival. Registration fee is forfeited once program commences. Visit [www.ifebp.org/policies](http://www.ifebp.org/policies) for additional details.

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San Diego, California

International Foundation  
OF EMPLOYEE BENEFIT PLANS 

18700 West Bluemound Road  
Brookfield, WI 53045

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OF EMPLOYEE BENEFIT PLANS

**Hotels are filling fast—  
Register today for the best options.**



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**ED249043**

# Connect. Collaborate. Learn.

With ten tracks representing over 120 sessions, the Annual Employee Benefits Conference delivers ample opportunities for you to connect, collaborate and learn about the topics that you need.

**Attend  
in person or  
virtually!**



SUNDAY  
KEYNOTE SPEAKER

**Jon Meacham**

Presidential Historian and  
Pulitzer Prize-Winning Author



MONDAY  
KEYNOTE SPEAKER

**Mike Walsh**

Global Nomad, Futurist and  
Best-Selling Author



TUESDAY  
KEYNOTE SPEAKER

**Marci Rossell**

Economic Forecaster,  
Former CNBC Chief Economist  
and Co-Host of Squawk Box



WEDNESDAY  
KEYNOTE SPEAKER

**Billy Beane**

Senior Advisor, Former  
Executive VP of Baseball  
Operations for the Oakland  
Athletics and Senior Advisor  
to Owner John Fisher

**Register Today!**  
[www.ifebp.org/usannual](http://www.ifebp.org/usannual)

