70TH ANNUAL EMPLOYEE BENEFITS CONFERENCE

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

Attend virtually or in person!

www.**ifebp.org**/usannual

SUNDAY
KEYNOTE SPEAKER
Jon Meacham

TUESDAY
KEYNOTE SPEAKER
Marci Rossell

MONDAY
KEYNOTE SPEAKER
Mike Walsh

WEDNESDAY
KEYNOTE SPEAKER
Billy Beane

COMPLETE
PROGRAM AGENDA

International Foundation
OF EMPLOYEE BENEFIT PLANS

70TH ANNUAL

EMPLOYEE BENEFITS CONFERENCE

November 10-13, 2024
San Diego Convention Center
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 130 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 (CE) credit for professional licenses and designations is **ONLY** available to those who attend the conference in San Diego.

CONTENTS

SESSION TRACKS

Hospitality Hub

Top Ten Reasons to Visit the Hub

Don't miss your chance to connect with fellow attendees, grab a snack, unwind with a massage, or update your LinkedIn profile with a headshot! The Hospitality Hub will be open throughout the conference, ready for your visit!

1. Update your profile photo with a new professional headshot.
2. Connect and recharge with a chair massage at the relaxation station.
3. Refresh with a snack or beverage during designated breaks.
4. Unwind with some fun and games!
5. Get help with using the app so you can make the most out of this handy conference tool.
6. View your transcript and figure out the next steps for your education.
7. Attend a quick Q&A session to learn more about getting involved with the Foundation, making the most out of your membership or obtaining your CEBS® designation.
8. Catch up on emails or notes in a workspace area.
9. If you're an administrator, join your colleagues on Wednesday for coffee and donuts.
10. Charge your device or use your computer at the work tables in Tech Central.

HOURS:

Monday and Tuesday
7:00 a.m.-4:30 p.m.

Wednesday
7:00-11:00 a.m.

Be sure to visit the Hospitality Hub on the second level!

Conference Schedule

Friday, November 8

Registration Open . . . . 8:00 a.m.-5:00 p.m. PT
2025 Registration . . . . 12:00 noon-5:00 p.m. PT
App Help . . . . 12:00 noon-5:00 p.m. PT

Saturday, November 9

Registration Open . . . . 7:00 a.m.-5:00 p.m. PT
Preconference Programs . . . . . 7:00 a.m.-5:00 p.m. PT
2025 Registration . . . . 7:00 a.m.-5:00 p.m. PT
App Help . . . . 12:00 noon-5:00 p.m. PT

Sunday, November 10

Registration Open . . . . 7:00 a.m.-5:00 p.m. PT
Preconference Programs . . . . . 8:00 a.m.-4:00 p.m. PT
Exhibit Hall Open* . . . . 12:00 noon-4:30 p.m. PT
2025 Registration . . . . 7:00 a.m.-5:00 p.m. PT
App Help . . . . 12:00 noon-4:00 p.m. PT
Opening Session* . . . . 4:30-6:00 p.m. PT
Welcome Reception in Exhibit Hall* 6:00-7:00 p.m. PT

Monday, November 11

Registration Open . . . . 6:30 a.m.-4:00 p.m. PT
2025 Registration . . . . 6:30 a.m.-4:00 p.m. PT
Hospitality Hub Open . . . . 7:00 a.m.-4:30 p.m. PT
Monday Keynote Session . . . . 7:30-8:45 a.m. PT
Breakout Sessions
9:15-10:15 a.m. PT | 10:45-11:45 a.m. PT
1:15-2:15 p.m. PT | 2:45-3:45 p.m. PT
Exhibit Hall Open . . . . 10:00 a.m.-3:00 p.m. PT
Lunch in Exhibit Hall . . . . 11:45 a.m.-1:15 p.m. PT
Public Sector Lunch Roundtables . . . 11:45 a.m.-1:15 p.m. PT
Public Sector Reception . . . . 4:00-5:00 p.m. PT

Tuesday, November 12

Registration Open . . . . 6:30 a.m.-4:00 p.m. PT
2025 Registration . . . . 6:30 a.m.-4:00 p.m. PT
Hospitality Hub Open . . . . 7:00 a.m.-4:30 p.m. PT
Tuesday Keynote Session . . . . 7:30-8:45 a.m. PT
Breakout Sessions
9:15-10:15 a.m. PT | 10:45-11:45 a.m. PT
1:15-2:15 p.m. PT | 2:45-3:45 p.m. PT
Exhibit Hall Open . . . . 10:00 a.m.-3:00 p.m. PT
Lunch in Exhibit Hall . . . . 11:45 a.m.-1:15 p.m. PT

Wednesday, November 13

Registration Open . . . . 6:30-11:00 a.m. PT
2025 Registration . . . . 6:30-11:00 a.m. PT
Hospitality Hub Open . . . . 7:00-11:00 a.m. PT
Breakout Sessions
7:30-8:30 a.m. PT | 9:00 a.m.-10:00 a.m. PT
Finale Session* . . . . 10:30-11:30 a.m. PT

**Guests are welcome to attend.*
Note: Exhibit hall is open to guests on Sunday only.
All times are subject to change.

Conference Snapshot

The Annual Employee Benefits Conference is an event like no other. Whether you're a first-time attendee or have been participating for years, be sure to get the most out of your time at the conference.

130+ SESSIONS TO CHOOSE FROM

14 TIMEFRAMES

10 TOPIC TRACKS

11 COMPLETED SESSIONS TO EARN YOUR CERTIFICATE OF ATTENDANCE

AUGUST **27** SESSION SELECTION DUE

Registrant, watch your email for instructions on how to create your schedule.

CHECK IN AT THE KIOSK to receive your badge.

FILL OUT and TURN IN CE forms to receive CE credit.

ENSURE YOUR BADGE IS SCANNED after each session to receive your certificate of attendance.

DOWNLOAD AND USE the conference app for all things related to the conference.

REGISTER FOR NEXT YEAR ON SITE

Bring your registration and full payment to the Hawaii booth located in the Hall D Lobby. See the conference schedule for hours.

Find the Sessions You Need

Content Levels

Sessions are developed for participants at a variety of experience levels and are identified as all, basic or advanced.

All

These sessions are applicable to trustees, administrators and fiduciaries at all levels of experience.

Basic

Basic sessions are intended for trustees and administrators just starting in the role or who have never attended an International Foundation conference.

Advanced

Advanced sessions are for experienced trustees, administrators, consultants, managers and those involved in the overall management of benefit trust funds.

Session Recommendations for New Trustees and Public Plans

As you page through this agenda, look for the symbols below. They represent sessions that are the best fit for you.

NT **Recommended for New Trustees**

P **Recommended for Public Plans**

Tracks

Sessions are divided into tracks to help you find the sessions that fit your needs. Tracks are color coded in the schedule, and a breakdown of the sessions in each track can be found on pages 16-37.

- Administration
- Fiduciary Responsibility
- General Topics
- Health and Welfare
- Investments
- Pension and Retirement
- Public Plans
- Apprenticeship, Training and Education
- Fund Professionals—Accountants
- Fund Advisors—Attorneys

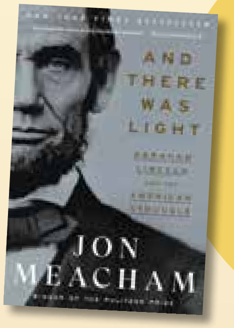
Sunday Opening Session

The 70th Annual Employee Benefits Conference will kick off with a keynote session by Jon Meacham, presidential historian and Pulitzer Prize–winning author, a contributor to *Time*, and a regular 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.

Sunday Keynote Speaker
Jon Meacham
Presidential Historian and Pulitzer Prize–winning Author

History Lessons From Epic Presidential Races

Sunday, November 10, 2024 | 4:30-6:00 p.m. PT



Meacham will be signing copies of his 2022 book, *And There Was Light: Abraham Lincoln and the American Struggle*, following the keynote address.

Join us for a kick-off concert at 4:30 p.m. PT.
The Radio Rebels

Keynote Speakers

Mike Walsh

Global Nomad, Futurist and Best-Selling Author

KEYNOTE SESSION

The AI-Powered Organization

Monday, November 11, 2024 | 7:30-8:45 a.m. PT

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.

Marci Rossell

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

KEYNOTE SESSION

Economic Update

Tuesday, November 12, 2024 | 7:30-8:45 a.m. PT

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.

Billy Beane

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

FINALE SESSION

Moneyball: The Art of Winning an Unfair Game

Wednesday, November 13, 2024 | 10:30-11:30 a.m. PT

Billy Beane, now senior advisor to Oakland Athletics owner John Fisher, has molded the team into one of baseball's most consistent winners since taking over as general manager following the 1997 season. Eventually rising to the role of executive vice president of baseball operations, Beane shattered traditional Major League Baseball beliefs that high payrolls equated wins by implementing a data-driven methodology that led the Oakland A's, with one of the lowest payrolls, to seven AL Western Division titles and ten playoff appearances. That strategic methodology has come to be known as the "Moneyball" philosophy and was turned into a best-selling book and movie.

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)~~ SOLD OUT
- 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 fulfill your fiduciary duties in your role with public sector pension and health plans.

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 PRECONFERENCES:

- Health, Wealth and Happiness—Planning Your Path to a Successful Retirement
- Cybersecurity and Social Engineering Fraud
- ~~Mental Health First Aid®~~ SOLD OUT
- Overcoming Bias in the Workplace: Stop the Unconscious Decision Making That Leads to Unexpected Consequences
- A Way With Words: How to Say What You Mean to Get What You Want
- Attorneys Only—Ethics and Diversity in Employee Benefits

Add on a preconference session, even if you're already registered for the main conference!

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

This course is 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

SOLD OUT

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.

The required TMP candidate classes are:

Honing your Trustee Communication Skills Part I
Monday, November 11 | 10:45-11:45 a.m. PT

Honing your Trustee Communication Skills Part II
Monday, November 11 | 1:15-2:15 p.m. PT

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, 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

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.

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

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.

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 to register for a preconference.

Preconference Options

New, Updated Workshop

Financial Planning Workshop

Two-Day Program

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

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

Speakers

Simon Chan
Founder and CEO
Adapt with Intent Inc.

Laurie D. Busbee
Attorney
Legacy Studio Estate Law

Rick Garnitz
Consultant

Kyra Jones
Chief Design Officer
Adapt with Intent Inc.

Bruce D. Schobel, CEBS, FSA, MAAA, CLU
Consulting Actuary

Kevin S. Seibert, CFP®, CEBS, CRC
Managing Director
International Foundation for Retirement Education (InFRE)

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, implement tools and tests to avoid fraud, review and implement the right insurance coverage, and more!

Kate Campbell, CIPP/E, CIPP/US, CIPM
Senior Counsel
Neal, Gerber & Eisenberg LLP
Chicago, Illinois

Sarah Sargent, CIPP/E, CIPP/US, CIPM
Associate
Godfrey & Kahn S.C.
Milwaukee, Wisconsin

Ken Kulawiak
Senior Manager
Wipfli
Chicago, Illinois

Mental Health First Aid (MHFA) at Work

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

SOLD OUT

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.

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

Overcoming Bias in the Workplace: Stop the Unconscious Decision Making That Leads to Unexpected Consequences

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.

Tony Chatman
Corporate Relationship Expert, Speaker and Author
Chatman Enterprises
Kalamazoo, Michigan

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.

Tony Chatman
Corporate Relationship Expert, Speaker and Author
Chatman Enterprises
Kalamazoo, Michigan

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 four hours of continuing legal education credits in ethics and diversity, inclusion, and elimination of bias training for benefit attorneys. This critical education will cover representation matters, contracts and relationships, disclosures, and DEI. Be sure to include your CLE request on the registration form with your state and BAR license number.

Linda Baldwin Jones, Esq.
Shareholder
Weinberg, Roger & Rosenfeld
Alameda, California

Marcelle J. Henry, Esq., LL.M.
Partner and Chairperson of ERISA/ Employee Benefits Group
Pitta LLP
New York, New York

John E. Mossberg, Esq.
Partner
Reinhart Boerner Van Deuren s.c.
Milwaukee, Wisconsin

Saná Walker, SHRM-CP
CEO and Chief Girlfriend
HR Girlfriends
San Diego, California

Administration

ADMINISTRATION

A01 Administrators Town Hall

Tuesday, November 12 **2:45-3:45 p.m.**

This discussion will offer an opportunity for administrators to discuss hot topics and challenges in plan administration with a panel of facilitators.

A02 Administrator's Guide to Onboarding New Trustees

Monday, November 11 **10:45-11:45 a.m.**

- Best practices
- Checklists for onboarding
  - —Plan and trust documents, policies for trustees
  - —Fund portals
  - —Trustee education expectations and appropriate sessions
  - —How to read and understand reports
  - —Behaviors and expectations

A03 Administrator's Guide to Collections and Payroll Auditing

Monday, November 11 **1:15-2:15 p.m.**

- Developing and implementing a strong delinquency policy
- Working with employers to improve reporting
- Increasing collections through payroll audits
- Communications between collections attorneys and the fund office
- Best practices with ACH and checks

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

Monday, November 11 **2:45-3:45 p.m.**

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

A05 Data Automation and Office Efficiency

Tuesday, November 12 **10:45-11:45 a.m.**

TPA and self-administered fund offices are essentially data companies. How can you implement data automation to improve efficiency?

- Going paperless
  - — Implement an electronic data management (EDM) system and data programs
  - — Efficiently identify changes in monthly employer contribution reports and issues
- Eliminate the need for various spreadsheets and manual processing
- Administrators' fund portal
  - — Develop a simple database that houses trustee information, benefit plan design (group suffixes/subgroups) and vendor/ contract information
- Compliance and appeal tracking system

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Administration

A06 Leadership Skills for a Healthy Workplace

Tuesday, November 12 1:15-2:15 p.m.

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

A07 Policy Review: Plan Operations to Insurance

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

Attend this session for a quick review of the many policies to consider for plan administration, such as:

- Education policy
- Delinquent and collection policy
- Fiduciary, cyber, business and other insurance policies
- Trustee expense and reimbursement policy.

A08 Administrator-Only Roundtables: Building Community

Wednesday, November 13 9:00-10:00 a.m.

This session is for administrators to have open discussions on hot topics and trends in benefits administration.

- Pre-board meeting work with professionals
- Planning for hybrid or virtual meetings
- Staff and succession planning
- Onboarding new trustees
- Agenda development and best practices for minutes

PLAN TO CONNECT WITH OTHER ADMINISTRATORS

Be sure to attend the special networking opportunity for administrators.

Coffee and Donuts for Administrators
Wednesday, November 13
8:30-9:00 a.m.
Hospitality Hub

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Fiduciary Responsibility

F01 Fiduciary Responsibility Basics

NT

Monday, November 11 **10:45-11:45 a.m.**

- 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?

F02 Best Practices in Trustee Processes and Oversight

NT

Monday, November 11 **1:15-2:15 p.m.**

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

F03 Understanding the Fiduciary Duty of Appointing a Multiemployer Trustee

NT

Monday, November 11 **2:45-3:45 p.m.**

- How are trustees appointed, and who has the authority to appoint them?
- Understanding your trustee fiduciary responsibility and duty to monitor
- Strategies for recruiting trustees
- Institutional knowledge and continuity

F04 Wearing the Right Hat at the Right Time—The Two-Hat Dilemma

NT

1 Tuesday, November 12 **9:15-10:15 a.m.**
2 Wednesday, November 13 **7:30-8:30 a.m.**

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

F05 Trustee Expenses—In Depth

NT

1 Tuesday, November 12 **9:15-10:15 a.m.**
2 Wednesday, November 13 **9:00-10:00 a.m.**

- 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

F06 Best Practices in Selecting and Monitoring Fund Professionals

P NT

Tuesday, November 12 **1:15-2:15 p.m.**

- Performance metrics and standards, including performance penalties
- Fees and reporting, including 408(b)2(B)
- RFPs and RFIs
- Cybersecurity best practices and questionnaire responses
- Reviewing service provider succession plans

Program Content All Basic Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

Fiduciary Responsibility

F07 Understanding Your Financial Statements and Budgeting

NT

Tuesday, November 12 **1:15-2:15 p.m.**

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

F08 Insurance for Plans and Trustees

NT

Monday, November 11 **10:45-11:45 a.m.**

- Overview of fiduciary liability and other insurance
- Do you have enough coverage?
- Understanding the timing for claims
- Benefit overpayment protection
- What other benefits does your policy offer?

F09 Vetting the Value of a "Professional" Trustee

Tuesday, November 12 **10:45-11:45 a.m.**

This session is designed to provide trustees with information on why some funds may use a "professional" trustee to fill vacancies.

- What are "professional" trustees and "independent" fiduciaries?
- Identify reasons a fund would seek a "professional" trustee
- What does the appointing entity hope to accomplish?
- Other concerns and considerations

F10 Responsibilities in a Defined Contribution Plan

NT

Tuesday, November 12 **10:45-11:45 a.m.**

- Timely transfer of worker contributions (wage deferrals) and employer contributions to the recordkeeper
- Choosing and monitoring investment options
- Understanding the various share classes and fees
- Participant loans and hardships

F11 Understanding Cyberliability Insurance

P NT

Monday, November 11 **2:45-3:45 p.m.**

- Can you rely on an "add-on" to your fiduciary liability or commercial umbrella insurance policy to protect your plan?
- How much coverage do you need?
- Are you covered if you aren't performing regular, independent security checks?
- What is the next trend for fiduciaries to consider?
- What is not covered?

F12 Fiduciary Town Hall— Running a More Efficient Trust Board Meeting

Tuesday, November 12 **2:45-3:45 p.m.**

This informative discussion will offer an opportunity to discuss meeting-related items such as setting an agenda, allocating enough time for agenda items, meeting preparation and materials, use of subcommittees, minutes and strategic planning.

Program Content All | Basic | Advanced

NT Recommended for New Trustees

P Recommended for Public Plans

General

GENERAL

FEATURED SESSION

G01 DOL Update

NT

Monday, November 11 9:15-10:15 a.m.

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

G02 Updates in Benefits Litigation

Monday, November 11 1:15-2:15 p.m.

Attend this session to learn about updates in litigation for employee benefit plans. The speaker will cover a range of new and/or updated cases within the federal court system.

G03 Fiduciary Education, International Foundation Member Benefits and Getting Involved

P NT

1 Monday, November 11 2:45-3:45 p.m.
2 Tuesday, November 12 2:45-3:45 p.m.

Join this session to learn more about the importance of fiduciary education for trustees and administrators of employee benefit plans and how International Foundation programs and resources can support your educational path.

- Fiduciary education: Who needs it and why?
- Educational paths
- International Foundation member benefits

G04 Communicating With Plan Participants

P NT

1 Monday, November 11 10:45-11:45 a.m.
2 Wednesday, November 13 9:00-10:00 a.m.

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

G05 Cybersecurity Update—Where Are We Now?

P

1 Monday, November 11 10:45-11:45 a.m.
2 Tuesday, November 12 1:15-2:15 p.m.

- Why investing in cybersecurity matters
- DOL and HHS guidance
- Staff training
- Best practices—What to do when you have a breach

G06 Aftermath of a DOL Cybersecurity Audit

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- DOL requests and prep for audit
- Audit findings and outcomes
- Lessons learned, new policies and procedures

G07-A09 Practical Uses for Artificial Intelligence in the Fund Office

1 Monday, November 11 2:45-3:45 p.m.
2 Tuesday, November 12 1:15-2:15 p.m.

This session aims to address the opportunities and challenges that artificial intelligence (AI) may bring to benefit fund administration, including how it is currently being utilized and its potential impact on the workforce.

Program Content All Basic Advanced

NT Recommended for New Trustees   P Recommended for Public Plans

General

G10 Worker Recruitment and Retention Update

1 **Monday, November 11** **2:45-3:45 p.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

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.

G11 Paid Leave in the Workplace

P

1 **Tuesday, November 12** **1:15-2:15 p.m.**
2 **Wednesday, November 13** **9:00-10:00 a.m.**

Paid leave covers everything from vacation and sick pay to bereavement and emergency leave. Join this panel discussion to learn about the latest trends.

- 2024 International Foundation survey results
- Strategies for compliance with state and local laws
- Implementation of new programs
- Best practices

G12 You Attended the U.S. Annual Conference—Now What?

P NT

Wednesday, November 13 **9:00-10:00 a.m.**

- Communicating key takeaways and actions at your next meeting
- Tips for implementing new initiatives
- Making the case for ongoing education

G13 Creating a Psychologically Safe Work Environment

P

Monday, November 11 **1:15-2:15 p.m.**

Fostering a positive working environment amidst uncertainties is crucial for organizational success. Hear from a consultant in organizational well-being about specific strategies you can implement to safeguard psychological safety and enhance employee morale and engagement through effective benefit programs.

G14 Mental Health and Nontraditional Benefits—Meeting Evolving Participant Needs

P

1 **Tuesday, November 12** **10:45-11:45 a.m.**
2 **Wednesday, November 13** **7:30-8:30 a.m.**

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.

Program Content All Basic Advanced

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Health and Welfare

H01 Health Care Kickoff—Identifying Your Cost Drivers

P NT

Monday, November 11 10:45-11:45 a.m.

This session will serve as an introduction to sessions in the health care track. Identify the cost drivers that are most impacting your plan and use this knowledge to decide which sessions to attend.

H02 Health Care Legal and Legislative Update

NT

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 1:15-2:15 p.m.

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.

H03 DOL Audit Trends for Health Plans

1 Monday, November 11 2:45-3:45 p.m.
2 Tuesday, November 12 10:45-11:45 a.m.

- Updates on DOL health plan audits and investigations
- Current trends, including mental health parity
- Future initiatives

H04 Stop-Loss Coverage—Understanding Your Options

P

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 9:00-10:00 a.m.

- 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

H05 Demystifying Your PBM Contract

P NT

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- How does a PBM work?
- Dissecting contract elements
- Ensuring proper transparency
- Fiduciary responsibility

H06 Communicating With Health Plan Participants

P NT

Monday, November 11 10:45-11:45 a.m.

- Tailoring messaging to specific generations
- Driving utilization of existing health offerings
- Getting creative while fulfilling legal obligations
- How to work with a communications professional

Program Content All Basic Advanced

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Health and Welfare

HEALTH AND WELFARE

H07 Retiree Health Care— Options for Your Participants

Tuesday, November 12 **2:45-3:45 p.m.**

- 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

H08 Health Plans 101— Terminology for New Trustees

P NT

1 **Monday, November 11** **1:15-2:15 p.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

- Identifying plan structures
- Who are your plan professionals?
- Abbreviations, acronyms, slang and more
- Written policy language

H09 Understanding Health Plan Actuarial Reports

P NT

1 **Monday, November 11** **2:45-3:45 p.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

- How to read the actuarial valuation
- Understanding how benefit changes affect cost
- Decisions for actuaries
- Decisions for trustees

H10 Whose Kid Is This? And Other Good Reasons to Conduct Dependent Eligibility Audits

P

1 **Monday, November 11** **10:45-11:45 a.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

- Who is an ineligible dependent?
- Why would an ineligible dependent be listed on the plan?
- How to conduct a dependent eligibility audit
- Potential cost savings

H11 Prescription Drug Pipeline Update

P

1 **Monday, November 11** **2:45-3:45 p.m.**
2 **Tuesday, November 12** **1:15-2:15 p.m.**

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

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

P

1 **Tuesday, November 12** **10:45-11:45 a.m.**
2 **Wednesday, November 13** **7:30-8:30 a.m.**

- 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

H13 Pharmacogenetics Update

P

Monday, November 11 **10:45-11:45 a.m.**

- Value of individualized treatment plans
- Updates on genetic testing and gene therapy
- Updated outcomes and effectiveness data

H14 Best Practices in Health Plan Cybersecurity

P

1 **Monday, November 11** **1:15-2:15 p.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

- Identifying common threats
- Steps for prevention
- Post-breach action steps

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Health and Welfare

H15 Health Care Technology Update

1 Tuesday, November 12 1:15-2:15 p.m.
2 Wednesday, November 13 9:00-10:00 a.m.

- The role of artificial intelligence (AI)
- Wearables and other devices
- Virtual offerings: Primary care, physical therapy, telepsychiatry and more
- Security considerations

H16 Using Data Analytics to Understand High-Cost Participants

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 10:45-11:45 a.m.

- Identifying your current high-cost participants
- Identifying who may become high-cost participants
- Strategies for improving population health, reducing plan volatility and mitigating costs
- Privacy and cybersecurity concerns

H17 Health Fund Mergers—Are They Feasible?

Tuesday, November 12 1:15-2:15 p.m.

- Plan communications and recordkeeping
- Comparison/grandfathering of benefits
- Network provider disruption issues
- Administrative, implementation and compliance issues
- Governance issues
- Case study examples of success

H18 Utilizing Direct Contracting Approaches

1 Monday, November 11 9:15-10:15 a.m.
2 Tuesday, November 12 10:45-11:45 a.m.

- Considerations for primary and ancillary benefit offerings
- Pros and cons of direct contracting approaches
- Case study examples of success

H19 On- and Near-Site Clinics—What's Working and What's Not?

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- Overview of design options
- Primary care, pharmacy, vision and other covered services
- Attributes of successful models: Analytics, communication, service integration and more

H20 Overcoming Barriers to Care

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 1:15-2:15 p.m.

- Identifying the social determinants of health and access to care
- The role of targeted communications
- Overcoming stigma and bias
- Strategies for success

H21 Autism Spectrum Disorders—Designing Proper Coverage

Tuesday, November 12 2:45-3:45 p.m.

- Identifying and diagnosing disorders
- What should be covered?
- Mental health parity considerations
- Considering the appropriateness of care

Program Content All Basic Advanced

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Health and Welfare

FEATURED SESSION

H22 Addressing Substance Use in the Trades

Monday, November 11 10:45-11:45 a.m.

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

H23 Mental Health Benefits—Helping Your Participants Access Crucial Resources

P

1 Tuesday, November 12 1:15-2:15 p.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- Achieving whole-person care
- Mental health parity considerations
- Coverage for substance use disorders
- Addressing provider shortages

H24 Emerging Mental Health Treatment Options

P

1 Monday, November 11 1:15-2:15 p.m.
2 Wednesday, November 13 9:00-10:00 a.m.

- Existing mental health treatment landscape
- Psychedelics in treatment (e.g., ketamine, LSD, MDMA, psilocybin)
- Importance of evidence-based therapies
- Where are we now?

H25 Psychedelics—A Panel Discussion

P

Tuesday, November 12 10:45-11:45 a.m.

- Advancements in the science and research of their effectiveness
- Legal landscape in the U.S.
- Application for employee benefit plans
  - — Plan design
  - — Cost
  - — Outcomes

H26 Advancements in Cancer

P

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 9:00-10:00 a.m.

- 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

Program Content All Basic Advanced

NT Recommended for New Trustees P Recommended for Public Plans

Investments

I01 Investing 101

P NT

Monday, November 11 10:45-11:45 a.m.

- Basics of stocks, bonds and interest rates
- Separate accounts, commingled funds and mutual funds
- Cyclical nature of investments
- Historical views of portfolio design
- Why market timing doesn't work

I02 Investments: A Fiduciary Primer

P NT

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 2:45-3:45 p.m.

- DOL guidance for making investment decisions
- Consultant vs. manager roles
- When is a consultant or manager a fiduciary?
- Can I give up my fiduciary responsibility for investment decisions?

I03 Investing for Health and Welfare, Apprenticeship Plans

NT

Monday, November 11 2:45-3:45 p.m.

- Investment horizon
- Risk tolerance
  - — Self-funded
  - — Hybrid
  - — Reserves and cash flows

I04 Working With Your Investment Professionals

P NT

1 Monday, November 11 9:15-10:15 a.m.
2 Tuesday, November 12 1:15-2:15 p.m.

- 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

I05 Stick to Your Plan: Let Your Investment Policy Statements Be Your Guide

NT

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- How to approach asset allocation
- How much detail should your investment policy statement (IPS) have?
- Why is it so important to keep your investments within the IPS guidelines?
- How to reconcile actuarial assumptions with investment return projections

I06 Basics of Defined Contribution Plan Investments

NT

Monday, November 11 2:45-3:45 p.m.

- Participant vs. trustee directed
- What is a QDIA?
- Fees: Custody, recordkeeping and investment
- Trustee responsibilities and risks

I07 Total Plan and Investment Manager Benchmarking

P NT

1 Monday, November 11 10:45-11:45 a.m.
2 Tuesday, November 12 1:15-2:15 p.m.

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

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Investments

INVESTMENTS

I08 Emerging Markets

Monday, November 11 **1:15-2:15 p.m.**

- The new BRICS
  - — Divesting from China
  - — Risks: Politics and policies
- Why have emerging markets underperformed?
- What to expect going forward

I09 Fixed Income Update

1 Monday, November 11 **2:45-3:45 p.m.**
2 Tuesday, November 12 **1:15-2:15 p.m.**

- How interest rates impact bond returns
- Reviewing your plan's bond allocation
- Investment grade vs. high yield
- Rethinking whole asset mix

I10 Alternative Investments: Private Equity

1 Tuesday, November 12 **9:15-10:15 a.m.**
2 Wednesday, November 13 **7:30-8:30 a.m.**

- Understanding private equity
  - — Liquidity constraints
  - — Fee structures
- Planning for illiquid assets in your portfolio
- History of the marketplace and why it is growing
- Are banks being replaced by private equity?

I11 The Future of Equity Investing

1 Tuesday, November 12 **10:45-11:45 a.m.**
2 Wednesday, November 13 **9:00-10:00 a.m.**

Join this panel for a discussion of the equity markets, including:

- Growth vs. value
- Active vs. passive
- How does "cap" size matter?
- Benefits and risks to portfolios.

I12 Investing in America's Future Infrastructure

1 Monday, November 11 **10:45-11:45 a.m.**
2 Tuesday, November 12 **2:45-3:45 p.m.**

- Update on the Infrastructure Investment and Jobs Act of 2021
- Global perspective
- Infrastructure funds
  - — Risk and liquidity
- Opportunities

I13 Real Estate: Current Status and Future Outlook

Monday, November 11 **1:15-2:15 p.m.**

- Sector outlook
- Open- and close-ended funds
- Strategies in your plan's portfolio
- Portfolio advantages and risks

I14 What If (Investment) History Repeats Itself? Looking Back to the Future

1 Monday, November 11 **10:45-11:45 a.m.**
2 Wednesday, November 13 **7:30-8:30 a.m.**

- How to set/understand a range of return expectations
- Understanding your plan's risk tolerance
  - — View of historical portfolio planning and market cycles
  - — Understanding what you own and how it will perform in different environments
- Actuarial perspectives

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Investments

I15 A Deep Dive Into Asset Performance—Understanding Attribution

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 9:00-10:00 a.m.

- Implementing your investment policy
- Understanding asset mix and its impact on returns
- Challenging your investment consultant based on performance and policy

I16 An Outsourced Chief Investment Officer (OCIO) Debate

NT

1 Tuesday, November 12 10:45-11:45 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- Challenging the model: Two sides of the coin
- Importance of fiduciary liability oversight of trustees
- Pitfalls and benefits

I17 Investing Special Financial Assistance Funds—Now What?

Tuesday, November 12 10:45-11:45 a.m.

- Regulatory requirements and trending options
- Legacy assets vs. special financial assistance (SFA) assets
- Audit requirements and risk management

I18 Liability-Driven Investments—Risk Management for Pension Plans

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 2:45-3:45 p.m.

- What is a liability-driven investment (LDI) strategy?
- Using strategies found in special financial assistance plan management
- Structuring plans to better prepare for decumulation
- Impact on a plan's financial health

I19 Artificial Intelligence in Investing

P

1 Tuesday, November 12 10:45-11:45 a.m.
2 Wednesday, November 13 9:00-10:00 a.m.

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

I20 Private Credit in Your Plans

P

1 Monday, November 11 2:45-3:45 p.m.
2 Tuesday, November 12 2:45-3:45 p.m.

- What is private equity?
- What is private credit?
- Valuation and liquidity issues
- Trustees' role in commitment and oversight
- Legal issues

I21 Proxy Voting—Updated DOL Regulations

NT

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- 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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Pension and Retirement

P01 Legal and Legislative Update for Retirement Plans

NT

1 **Monday, November 11** **10:45-11:45 a.m.**
2 **Tuesday, November 12** **1:15-2:15 p.m.**

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

P02 Understanding Pension Plan Withdrawal Liability

NT

Monday, November 11 **10:45-11:45 a.m.**

- Overview of withdrawal liability
- Where/when does it apply? Are there exceptions?
- Approaches to managing withdrawal liability
- Review of experiences

P03 Advanced Withdrawal Liability Topics

Monday, November 11 **1:15-2:15 p.m.**

- Using separate assumptions for funding and withdrawal liability calculations
- Complete or partial withdrawal liability
- PBGC regulations—What's new?
- Legal and other issues

P04 Pension Plan Actuarial Basics for the Nonactuary

P NT

1 **Monday, November 11** **9:15-10:15 a.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

- 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?

P05 Dueling Pension Actuaries

P

1 **Monday, November 11** **2:45-3:45 p.m.**
2 **Tuesday, November 12** **2:45-3:45 p.m.**

In a series of short debates, learn about varying considerations and perspectives on the following:

- Moving the discount rate
- Discount rates for funding vs. withdrawal liability
- Asset methods
- Mortality rates
- Variable plans.

P06 Investment Consultant and Pension Actuary Conversation

P NT

1 **Tuesday, November 12** **9:15-10:15 a.m.**
2 **Wednesday, November 13** **9:00-10:00 a.m.**

- Which comes first: The actuarial assumption or the investment allocation?
- Approaching the issue differently and managing risk
- Implications for actuarial assumptions and investment allocation

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Pension and Retirement

PENSION AND RETIREMENT

P07 Conversation With the PBGC

1 Monday, November 11 10:45-11:45 a.m.
2 Tuesday, November 12 2:45-3:45 p.m.

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

P08 Effectively Communicating Your Retirement Plans

P NT

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 1:15-2:15 p.m.

- 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

P09 Defined Contribution Plan Risk—Options to Minimize and Mitigate

P NT

1 Monday, November 11 10:45-11:45 a.m.
2 Tuesday, November 12 2:45-3:45 p.m.

The session will discuss how to provide choice and manage risk, including:

- Annual expense review
- Target date fund review
- Overall expenses compared to a peer universe
- Financial literacy and distribution education.

P10 The Impact of Noninvestment Risks on Your Pension Plan

P NT

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 2:45-3:45 p.m.

We typically think about the risk due to asset allocation; this session will identify various noninvestment risks, including:

- Plan maturity risk
- Demographic risk
- Plan design risk
- Employer risk
- Industry risk.

P11 Post–Special Financial Assistance—Keeping Your Plan Solvent

Monday, November 11 2:45-3:45 p.m.

- Implications of SFA for the short- and long-term solvency prospects of affected plans
- Investment approaches intended to advance solvency beyond 2051
- Post-SFA distribution compliance
- Plan design and risk mitigation

P12 Understanding Alternative Pension Plan Designs

1 Monday, November 11 10:45-11:45 a.m.
2 Tuesday, November 12 1:15-2:15 p.m.

- Overview of different designs
  - — Adjustable pension plan (APP)
  - — Variable annuity pension plan (VAPP)
- Administrative and technology issues
- Transition issues
- Benefits and risks

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Pension and Retirement

P13 Variable Annuity Pension Plan—Choose Your Own Adventure

1 Monday, November 11 1:15-2:15 p.m.
2 Tuesday, November 12 10:45-11:45 a.m.

Can a solution be found in changing a formula? Join this interactive session to discuss key factors to consider when choosing to switch to a VAPP and apply those factors to a demo pension plan. During a follow-up session, Variable Annuity Pension Plan—Lessons Learned, the demo plan will be debriefed, discussing implications the plan may encounter.

P14 Variable Annuity Pension Plan—Lessons Learned

1 Monday, November 11 2:45-3:45 p.m.
2 Wednesday, November 13 9:00-10:00 a.m.

This is a follow-up session to Variable Annuity Pension Plan—Choose Your Own Adventure. A panel of experts will debrief the pros, cons and potential unintended consequences of a proposed pension plan as devised by the session's live audience participation.

P15 A Survey of the Retirement Landscape

P NT

1 Tuesday, November 12 9:15-10:15 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- Impact of longevity
- Generations in the workforce
- Economic impacts

P16 Modern Defined Contribution Plan Design

P

1 Monday, November 11 2:45-3:45 p.m.
2 Wednesday, November 13 9:00-10:00 a.m.

- Ideal investment choices
- SECURE 2.0 implications
  - — Automatic enrollment
  - — Escalation features
  - — Required minimum distributions
- Financial literacy and distribution education
- Income payout options

P17 Challenges Facing Defined Contribution Plans

P

1 Tuesday, November 12 10:45-11:45 a.m.
2 Wednesday, November 13 7:30-8:30 a.m.

- 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)

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Pension and Retirement

P18 SECURE 2.0 ACT Update—2024 and Beyond

P

Tuesday, November 12 **10:45-11:45 a.m.**

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

P19 SECURE 2.0 ACT—Get the Most Out of Your Plan

P

Monday, November 11 **1:15-2:15 p.m.**

- The ability to include student loan benefits in plans
- Tools to help employees establish an emergency savings account
- Ways to increase catch-up contributions for near-retirees
- Expanded tax credits for new retirement plans

P20 My Pension Plan Is Well-Funded—Now What?

P

1 Tuesday, November 12 **9:15-10:15 a.m.**
2 Wednesday, November 13 **9:00-10:00 a.m.**

- Benefit improvements: Covering all service or only future service?
- Risk management
- Reconsidering actuarial assumptions

P21 DOL Retirement Plan Audit Trends

NT

1 Monday, November 11 **2:45-3:45 p.m.**
2 Tuesday, November 12 **10:45-11:45 a.m.**

Attend this session to learn about the Department of Labor's trends in retirement plan audits and investigations. Everything from current trends to future initiatives will be covered, as well as details on how to successfully navigate an investigation.

P22 Suspension of Benefits Retirement Plan Rules and Workforce Needs

1 Tuesday, November 12 **1:15-2:15 p.m.**
2 Wednesday, November 13 **7:30-8:30 a.m.**

Employers are facing workforce challenges and need seasoned employees to remain in covered employment, even on a part-time basis. But participants need to collect their pension benefits, which often runs afoul of plans' suspension of benefits rules.

- Can the pension plan suspension of benefits rules help solve this problem?
- Regulatory options
- Industry and other considerations

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Public Plans

PE1 Litigation Trends for Public Plans

Monday, November 11 **10:45-11:45 a.m.**

- Current litigation and claims against public sector retirement and health plans
- Strategies for reducing litigation risk
- Steps to take if your plan is at risk or in litigation

PE2 Public Sector Plans: Money Managers in Defined Contribution Plans

Monday, November 11 **9:15-10:15 a.m.**

- 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

PE3 Artificial Intelligence—A Futurist Perspective for Public Sector Plans

Monday, November 11 **1:15-2:15 p.m.**

- Risks and opportunities
- Vendors
- Theoretical vs. practical

PE4 Public Employee Retirement Strategy

Monday, November 11 **2:45-3:45 p.m.**

- The relationship between Social Security, Medicare and the pension plan
  — Coverage
  — Cost
  — Eligibility
  — Government pension offset
- Helping members calculate their highest value option
- Making the best decisions for your plan

PE5 Headline Risk: Keeping Public Employee Plans Out of the News

Tuesday, November 12 **10:45-11:45 a.m.**

- Nonbenefit laws
  — Open meeting laws
  — Public procurement laws
  — Public records requests, etc.
- Return-to-work rules and the perception risk

PE6 Public Employee Disability Claims and Pension Decisions

Tuesday, November 12 **9:15-10:15 a.m.**

- How are decisions typically made?
- Appeals process
- What happens when a diagnosis is not clear?
- Navigating mental health claims such as PTSD

Program Content All | Basic | Advanced

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Public Plans

PE7 — Public Sector Paid Family Leave Issues

Tuesday, November 12 **1:15-2:15 p.m.**

- Navigating state, local and national legislation
- Addressing the politics of aligning coverage to state law
- Designing the benefit for equity and inclusion

PE8 — Ensuring Public Employee Health Benefits Are Inclusive

Monday, November 11 **2:45-3:45 p.m.**

- Defining "inclusive" health benefits
- Meeting member needs
- Navigating legal and political landscapes
  - What's the difference between inclusive benefits and benefit carve-outs?

PE9 — Public Sector Recruitment Challenges

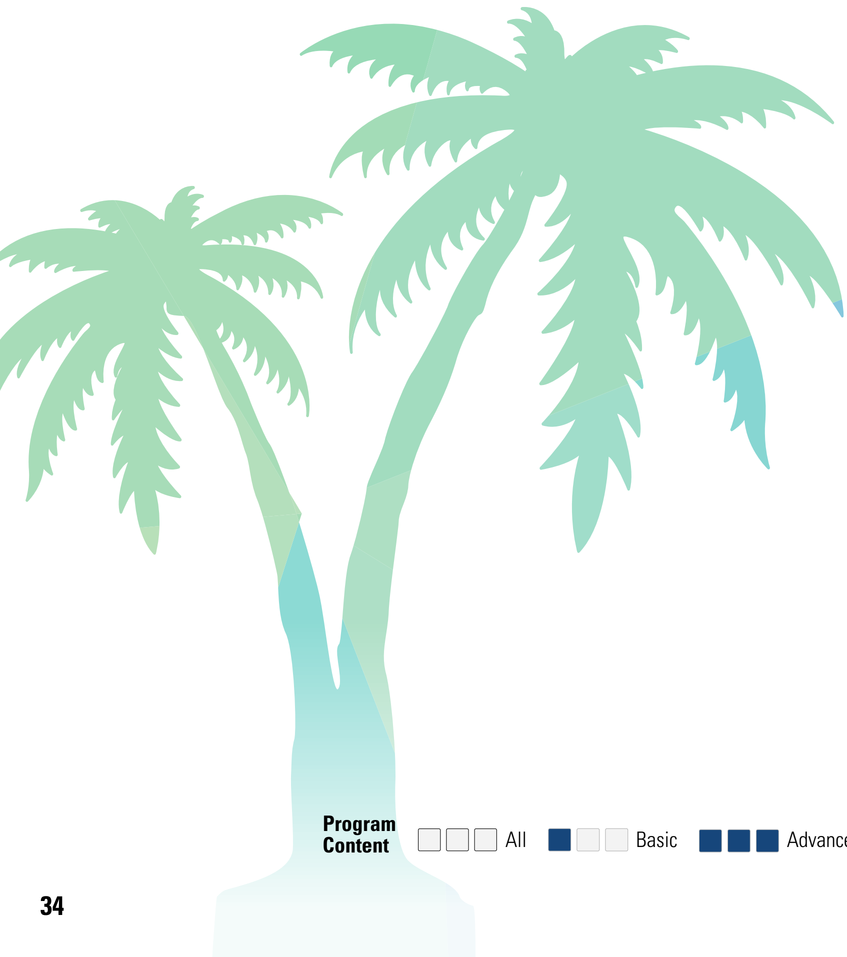
Tuesday, November 12 **2:45-3:45 p.m.**

- 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

PE10 — Public Plan Approaches to Retiree Health Coverage

Tuesday, November 12 **10:45-11:45 a.m.**

- Overview of coverage options pre- and post-Medicare enrollment
- Pros and cons for health plans and participants
- Examples of successful approaches in action



Over 500 public sector representatives attend every year! Connect with others by attending these networking opportunities.

Public Sector Lunch Roundtables
Monday, November 11 | 11:45 a.m.-1:15 p.m. PT

Public Sector Reception
Monday, November 11 | 4:00-5:00 p.m. PT

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Apprenticeship, Training and Education

T01 DOL Audits of Apprenticeship Funds

Monday, November 11 **10:45-11:45 a.m.**

- Identifying the unique elements of a training fund
- Policies and procedures to safeguard against violations
- Expenses to avoid
- Case study examples

T02 Operational Policies for Your Apprenticeship Training Fund

Monday, November 11 **1:15-2:15 p.m.**

- Which policies should every fund have? What are you missing?
- How often should your policies be updated?
- Legal requirements
- Communication methods

T03 Innovative Outreach—Best Practices for Apprenticeship Funds

Monday, November 11 **2:45-3:45 p.m.**

- Utilizing your networks: Schools, community colleges, military, incarcerated populations and more
- Recruitment strategies beyond job and career fairs
- Ideas/initiatives for all fund sizes

T04 The Impact of Women on the Jobsite

Tuesday, November 12 **10:45-11:45 a.m.**

- Understanding the unique needs of women
- What you can and cannot do
- Creating welcoming environments for women
- Best practices for your fund

T05 Cybersecurity Options for Your Apprenticeship Fund

Tuesday, November 12 **1:15-2:15 p.m.**

- Impact of cyber-risk on apprenticeship funds
- Legal requirements
- Response/recovery plans, insurance, two-factor authentication and other strategies
- Considerations for smaller funds

T06 Improving Jobsite Awareness

Tuesday, November 12 **2:45-3:45 p.m.**

- Preventing workplace violence
- First responder training: First-aid, CPR, AED, Narcan and more
- Importance of active shooter training
- Crisis intervention strategies
- Fitness-for-work considerations

T07 Apprenticeship and Training Grants—Finding and Obtaining External Funding

Tuesday, November 12 **9:15-10:15 a.m.**

Training funds continue to obtain funding from a wide variety of external sources. This session will provide insights for trustees looking to navigate the process, including:

- Where to look for opportunities
- Navigating the application process
- Best practices for success.

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Fund Professionals—Accountants

P-ACCT1 Accountants: Regulatory Update

Monday, November 11 **10:45-11:45 a.m.**

Review the latest accounting and auditing technical guidance, including:

- Regulatory agenda
- Enforcement activities and priorities
- Recent proposed and enacted guidance.

P-ACCT2 Accountants: Best Practices in Audit Quality

Monday, November 11 **1:15-2:15 p.m.**

This session has been designed to review the Department of Labor's Audit Quality Report, addressing the findings and reviewing how to best handle deficiencies from the auditor's point of view.

P-ACCT3 Accountants: The Future for the Audit Professional

Monday, November 11 **2:45-3:45 p.m.**

A panel of professionals will lead a discussion for CPAs and their accounting and auditing staff.

- What will audit teams look like and how do we find talent?
- Competition in the workforce
- The role of technology
- Creating efficiencies
- Potential pitfalls

P-ACCT4 Accountants: Advanced Payroll Audits

Tuesday, November 12 **10:45-11:45 a.m.**

This session will present hypothetical issues that payroll auditors may run into and the best way to handle them, including:

- Trustee concerns
- Contract interpretation
- Missing or bad payroll records
- When to contact the attorney
- How AI could help.

P-ACCT5 Accountants: Intersection of Internal Controls and Cybersecurity

Tuesday, November 12 **1:15-2:15 p.m.**

- Penetration testing
- Third-party security controls
- Documentation—How it's used in the audit and how to understand the audit report
- What is being found?

P-ACCT6 Accountants: Town Hall

Tuesday, November 12 **2:45-3:45 p.m.**

A panel of professionals will lead a discussion around emerging issues and best practices for CPAs and their accounting and auditing staff.

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Fund Advisors—Attorneys

P-ATTY1 Attorneys: Update on the SFA Program for Fund Professionals

Monday, November 11 10:45-11:45 a.m.

- Update to the application process
- Changing documentation requirements for funds that received SFA
- Investment manager selection for SFA assets
- Preparing for a post-SFA DOL audit

P-ATTY2 Attorneys: Regulatory Update for Attorneys

Monday, November 11 1:15-2:15 p.m.

- Retirement Security Rule
- QPAMs
- In-depth look at proposed DOL regulatory action
- NQTLs
- SECURE 2.0 updates for attorneys

P-ATTY3 Attorneys: Concerns Related to PBM Contracts

Tuesday, November 12 10:45-11:45 a.m.

- Recent litigation
- PBM contract terms
- PBM monitoring

P-ATTY4 Attorneys: Ethical Considerations

Monday, November 11 2:45-3:45 p.m.

This session will discuss recent developments in the representation of ERISA plan stakeholders; attorney-client privilege, work product doctrine and their representation; and the ethical rules and considerations for attorneys who work remotely. The session will also focus on the impacts of technology (including artificial intelligence (AI)) on the legal profession.

P-ATTY5 Attorneys: Employment Discrimination in Employee Benefits

Tuesday, November 12 1:15-2:15 p.m.

- The relationship between employment laws (FMLA, military leave, workers' compensation, etc.) and ERISA for employee benefit plan rules
- How to avoid employment discrimination issues and litigation for your benefit plan and your fund office
- Roles of individual representatives vs. trustees

P-ATTY6 Attorneys: The State of the Law on Prohibited Transactions

Tuesday, November 12 2:45-3:45 p.m.

- Review of ERISA-prohibited transaction provisions
- Review of prohibited transaction exemptions
- Recent guidance
- Practical application

Don't forget to register for the attorney-only preconference offering—

Ethics and Diversity in Employee Benefits

See page 15 for details.

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Continuing Education

Sessions at the in-person Annual Conference may qualify for continuing education (CE) credit hours for numerous designations. The International Foundation seeks approval based on requests received **at least 90 days in advance**. When you register to attend the in-person conference, request CE credit on your registration form. Please note: Requests made for CE credit do not guarantee administration of credit. Visit www.ifebp.org/usannualCE to learn more. For questions, contact us at (262) 786-6710, option 2, or continuinged@ifebp.org.

CEBS® COMPLIANCE CREDIT

Annual Conference sessions may qualify. Visit www.cebs.org/compliance for information.

INSURANCE

Approval is based upon requests and is not automatically sought in all states. Only certain sessions will be eligible for credit, and a list will be provided on site.

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INVESTMENTS

Approval is based upon requests and is not automatically sought. Only certain sessions will be eligible for credit, and a list will be provided on site.

ACCOUNTING

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

ENROLLED ACTUARY

Only certain sessions will be eligible for credit, and a list will be provided on site.

CONTINUING EDUCATION CERTIFICATE

In Person—Yellow CE forms will be provided at check-in and must be filled out completely and submitted at the end of each session to ensure proper administration of credit. Due to state and license board regulations, forms cannot be accepted at any other time. **These forms are in addition to having your badge scanned.**

Note: CE certificate is separate from your International Foundation certificate of attendance.

Questions?

Visit www.ifebp.org/usannualCE for details and information on submitted sessions. You can also contact our CE department at (262) 786-6710, option 2, or continuinged@ifebp.org with questions.

Looking to Connect With 5,000+ Potential Leads?

Be part of the nation's largest conference in the employee benefits field by exhibiting at or sponsoring the 70th Annual Employee Benefits Conference! Increase your brand exposure and build your business! Exhibits and sponsorships provide you with an opportunity for in-person contact with our audience of 5,000+ multiemployer and public sector trustees, administrators and support staff who represent billions of dollars in health and welfare and pension fund assets!

This year's conference will include a virtual option with a virtual Vendor Showcase, making it more accessible by bringing education to everyone and greater exposure for exhibitors and sponsors!

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List Pulled 7/12/24

Conference Details

TRANSPORTATION

Complimentary shuttle bus service will be provided to all conference registrants, exhibitors and guests from Saturday, November 9 through Wednesday, November 13, 2024. Shuttle service will be provided to those hotels listed on page 43 with the bus icon.

Prior to the Conference
If you have special transportation needs or questions regarding the shuttle system, please contact Bridget Mergen, coordinator of shuttle service, at (262) 373-7655 or bridgetm@ifebp.org.

Wheelchair and Scooter Rentals
Wheelchair and scooter rentals are available through MobilitySource. To book, please visit https://mobilitysource.com or call (619) 234-9505.

POLICIES AND GUIDELINES

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 (3) days (eight (8) days for Disney properties) of arrival. Registration fee is forfeited once program commences. For a complete list of policies, see www.ifebp.org/policies.
For rules of conduct and regulations, visit www.ifebp.org/usacguidelines.

FRIENDS OF BILL W.

Meetings will be held during the Annual Conference. Meeting times and location information will be listed on the conference app and in the conference guide.

Acknowledgments

A special thank-you to our Executive Committee and supporting committees for their time and efforts in developing the 70th Annual Employee Benefits Conference.

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Hotel Information

Hotel reservation deadline: September 23, 2024

Visit **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. Hotel reservations are confirmed on a first-come, first-served basis. Best available will be assigned. If you don't receive your preferred hotel, **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**
   IF Block 250 | $309 single/double
3. **Hilton San Diego Airport/Harbor Island***
   IF Block 100 | $249 single/double
4. **Hilton San Diego Bayfront***
   IF Block 1,000 | $316 single/double
5. **Hilton San Diego Gaslamp Quarter**
   IF Block 150 | $315 single/double
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**
   IF Block 650 | $309 single/double
11. **Margaritaville Hotel San Diego Gaslamp Quarter**
   IF Block 100 | $286 single/double
12. **Marriott Marquis San Diego Marina**
   IF Block 500 | $321 single/double
13. **Omni San Diego Hotel**
   IF Block 350 | $305 single/double
14. **San Diego Marriott Gaslamp Quarter**
   IF Block 200 | $315 single/double
15. **Sheraton San Diego Hotel & Marina***
   IF Block 200 | $264 single/double
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**
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20. **Pendry San Diego**
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70TH ANNUAL EMPLOYEE BENEFITS CONFERENCE

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Attend in person or virtually!

With ten tracks representing over 130 sessions, the Annual Employee Benefits Conference delivers ample opportunities for you to connect, collaborate and learn about the topics that you need.

SUNDAY
KEYNOTE SPEAKER

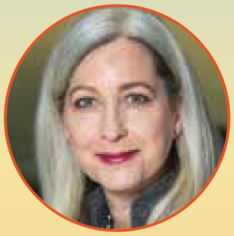
Jon Meacham

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

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