Advanced Trustees & Administrators Institute

February 15-17, 2027
Disney's Yacht & Beach Club Resorts
Orlando, Florida
Preconferences: February 13-14

PROGRAM SNEAK PEEK

www.ifebp.org/trusteesadministrators

Education to Navigate the Future



International Foundation
OF EMPLOYEE BENEFIT PLANS

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Education to Help Navigate the Future

The **Advanced Trustees and Administrators Institute** serves as your source for insights, solutions and networking in your industry. Whether you're an experienced trustee or just getting started, this conference has the education you need to run your pension, health and welfare funds effectively. From legislative changes and shifting DOL guidance to funding your plans and ensuring compliance, get your questions answered this February with sessions designed to help you navigate the present and future.

Main Conference

The main conference runs February 15-17, 2027 and offers two tracks.

- **New Trustees Institute—Level I: Core Concepts** is for trustees who are new to serving on a multiemployer fund within the first three years in the role.
- **Advanced Trustees and Administrators Institute** covers hot topics in benefits and is designed for multiemployer trustees and administrators who have three or more years of experience.

Preconference Options and Accompanying Programs

- **Trustees Institute—Level II: Concepts in Practice** takes the content covered in New Trustees further with group discussions and case studies.
- **Multiemployer Plan Administration** is for salaried and third-party administrators of multiemployer plans.
- **Public Plan Trustees Institute—Level I and Level II** are designed for public sector health and retirement trustees and other fiduciaries.
- **One-Day Sunday Preconference Workshop:** Understanding AI and How It Works in Benefits

Five Reasons You Need to Be at the Advanced Trustees and Administrators Institute

1. **Deep Dive Into the Most Urgent Current Issues**
   This program is built for trustees and administrators, by trustees and administrators. Sessions are designed to tackle the current issues your fund is facing and provide insight into how to best address them.

2. **Insight Into Changes in Government Policy**
   Understanding the regulatory and legislative environment and what is coming down the line will help you stay compliant.

3. **A Comprehensive Economic Update**
   This information is vital to your strategic planning. The conference kicks off with the Economic Update, covering hot topics such as the path of inflation, labor markets, changes from AI, interest rates and much more.

4. **New Point Solutions**
   Take advantage of the exhibit hall and networking receptions to hear directly from new and innovative service providers. Make connections to help you find solutions you can bring back to your fund.

5. **Strong Peer Networking Opportunities**
   Connect with fellow trustees and administrators who are facing similar challenges to your fund and may have solutions that you have been looking for. Build a strong network you can lean on beyond the on-site conference experience.



Conference at a Glance

SUNDAY | February 14, 2027	
7:00-8:00 a.m.	Preconference Registration
8:00 a.m.-1:00 p.m.	Preconference
4:00-6:00 p.m.	Main Conference Registration/Information
MONDAY | February 15, 2027	
6:30 a.m.-4:00 p.m.	Registration
6:30-7:30 a.m.	Continental Breakfast
7:30-11:45 a.m.	Educational Sessions (75-minute sessions with 15-minute breaks in between)
11:45 a.m.-1:15 p.m.	Lunch
1:15-4:00 p.m.	Educational Sessions
4:00-5:00 p.m.	Welcome Reception
TUESDAY | February 16, 2027	
6:30 a.m.-4:00 p.m.	Registration
6:30-7:30 a.m.	Continental Breakfast
7:30-11:45 a.m.	Educational Sessions
11:45 a.m.-1:15 p.m.	Lunch
1:15-4:00 p.m.	Educational Sessions
WEDNESDAY | February 17, 2027	
6:30-11:45 a.m.	Registration
6:30-7:30 a.m.	Continental Breakfast
7:30-11:45 a.m.	Educational Sessions

(All times are listed in Eastern Time.)

An Agenda Shaped by People Who Know Your Work

The program is developed by a committee of trustees and administrators who understand the challenges you face every day. You can expect sessions to address:

- **Economic, legal and legislative updates** to keep you ahead of what's changing
- **Investments and plan design**, including asset allocation, investment oversight and collective bargaining
- **Health care cost-containment strategies** for today and tomorrow
- **Technology and risk**, including AI policies and cybersecurity
- **Participant engagement**, from education and communications to retirement readiness
- **Fund operations and governance**, including service provider oversight, trustee onboarding and fund office management
- **Trustee and administrator roundtables** on challenges and emerging trends.







New Trustees Institute—Level I: Core Concepts

February 15-17, 2027

Designed for Taft-Hartley multiemployer benefit plan trustees, the **New Trustees Institute—Level I: Core Concepts** course encompasses five modules, covering the core areas of responsibility within the role of a trustee. Take away an understanding of the key issues in managing your retirement, health and welfare, or apprenticeship funds as well as the complexities of trust fund management and administration.

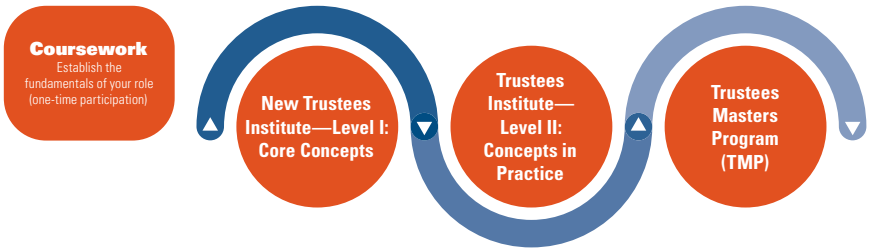
This content is for those new to serving on a multiemployer trust fund, within the first three years of service, or trustees who have not previously attended a foundational education program. New Trustees Institute—Level I: Core Concepts is also ideal for collective bargaining personnel and others who work with trustees and want a better understanding of their role and responsibilities.

Topics Include:

- Trustee responsibility and legal environment
- Investing health and welfare and pension assets
- Governance
- Overview of health and welfare plans
- Overview of retirement plans

Visit www.ifebp.org/febnewtrustees for more information.

Multiemployer **Trustees and Fiduciaries** Education Path



Looking for public sector fiduciary education?

Check out the **Public Plan Trustees Institute—Level I** and **Public Plan Trustees Institute—Level II** courses offered concurrently this February in Orlando at www.ifebp.org/public.

Preconference Programs

Maximize your education with a preconference program. Three options are available this February:

Understanding AI and How It Works in Benefits

February 14, 2027 | 8:00 a.m.-1:00 p.m.

Gain a clear, practical understanding of AI and learn how trustees and administrators can use it responsibly to improve communications, support plan administration and better serve participants.

Trustees Institute—Level II: Concepts in Practice

February 13 | 8:00 a.m.-5:00 p.m.
February 14 | 8:00 a.m.-4:00 p.m.

To be eligible to attend this course, you must have completed the New Trustees Institute—Level I course.

Topics Include:

- Governance/administration
- Investments
- Retirement
- Health plans

Visit www.ifebp.org/febtrusteeslevel2 for more information.

Multiemployer Plan Administration

February 13 | 8:00 a.m.-5:00 p.m.
February 14 | 8:00 a.m.-3:00 p.m.

Topics Include:

- Administrative models and roles
- Governance
- Health, retirement and other plans
- Administrative investment basics
- Accounting for plan administration
- Plan professional management
- Case study and group work

Visit www.ifebp.org/MEplanadmin for more information.

Disney's Yacht & Beach Club Resorts

Evoking the timeless era of New England seaside hotels from the late 1800s, Disney's Yacht & Beach Club Resorts welcome guests into a world of hardwood floors, brass fittings and luxurious accommodations. Anchored along the shores of the 25-acre Crescent Lake, the resorts offer casual elegance combined with serene grounds and nautical touches that transport guests to another place and time. When seeking a little unique recreation, guests can soak up the sun on the white-sand beaches lake-side or cool off at Stormalong Bay, a unique 750,000-gallon feature pool complete with water slide, sandy bottom, whirlpools and water current.



Disney's Yacht & Beach Club Resorts

Reservation Deadline: Friday, January 22, 2027

Rate: US$369 single/double occupancy (Additional US$35/person per night for a third and/or fourth guest)

Hotel Accommodations: Please visit our Hotel/Travel tab at www.ifebp.org/febtrusteeshotel to book your hotel reservations online and to view applicable taxes and fees. For hotel questions, contact the Registration Department at (888) 334-3327, option 2, or edreg@ifebp.org.

Hotel Cancellation Policy: A fee of one (1) night room rate plus tax will be charged for reservations canceled within eight (8) days prior to arrival.

Note: Hotel room availability is not guaranteed outside of scheduled program dates. Hotel reservations are confirmed on a first-come-first-served basis. Best available rate/hotel will be assigned if necessary.

Hotel accommodations are reserved exclusively for registered attendees. We reserve the right to cancel or release any hotel reservations associated with a guest who is not registered for the event.

***Bonus*—Enjoy special access and savings:**

- **Partial-Day Tickets**—Perfect for postmeeting fun
- **Advance Purchase Savings**—Save up to 20%* on one-day and multiday tickets when purchased before February 14, 2027.
- **Additional Disney Magic**—Multiday tickets include an extra Disney experience.
- **Extended Ticket Window**—Tickets are valid from seven days before your event through seven days after, so you can enjoy Disney on your own schedule.

Visit www.disneyevent.com/ifebptaiwm2027 for more details on special pricing for attendees!

Savings based on the nondiscounted price for the same ticket sold at Disney-owned and operated Guest Service desks in the Central Florida area as of February 25, 2025.

Exhibit and Sponsor Opportunities

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

Benefits of Exhibiting:

- Reach a concentrated audience of over 400 trustees, administrators and plan professionals who serve multiemployer benefit plans.
- Learn about the issues impacting your clients today by participating in educational sessions and networking with peers.
- Secure qualified leads—Attendees at each conference are decision makers who can directly impact your bottom line.

Contact Us!

For Exhibits and Sponsorships
Contact Julie Ichiba at (262) 373-7674 or jichiba@ifebp.org.

Ready to Reserve a Booth Space or Sponsorship?
Request a 2027 Exhibitor Brochure and U.S. Specialty Sponsorship Brochure for full details.
Contact Julie Ichiba at (262) 373-7674 or jichiba@ifebp.org.





REGISTRATION

Register today at www.ifebp.org/trusteesadministrators.

CONFERENCE REGISTRATION FEES

	Through January 4, 2027	After January 4, 2027
Advanced Trustees and Administrators Institute	Member: $1,850 Nonmember: $2,180	Member: $2,150 Nonmember: $2,480
New Trustees Institute—Level I: Core Concepts		
Trustees Institute—Level II: Concepts in Practice	Member: $1,850 Nonmember: $2,180	Member: $2,150 Nonmember: $2,480
Multiemployer Plan Administration	Member: $1,550 Nonmember: $1,770	Member: $1,850 Nonmember: $2,070
Public Plan Trustees Institute—Level I		
Public Plan Trustees Institute—Level II		
Sunday Preconference	Member: $580 Nonmember: $690	Member: $730 Nonmember: $840

Separate registration for the preconferences is required.

Preconferences

POLICIES

Cancel and transfer 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%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

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

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

CEBS COMPLIANCE APPROVED

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

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Register by **January 4** to save **US$300** with the early registration discount!

Visit www.ifebp.org/trusteesadministrators to register.



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