

Investments Institute

April 30-May 1, 2025

Luminary Hotel & Co. | Fort Myers, Florida

*Your source on what
the new administration
will bring to the markets!*



Fort Myers, Florida

**Register online by March 17 to save \$300.
www.ifebp.org/investments**

www.ifebp.org/investments

International Foundation
OF EMPLOYEE BENEFIT PLANS



PROGRAM AT A GLANCE

WEDNESDAY April 30, 2025	
8:15-9:30 a.m.	Navigating a Transforming Market
9:45-10:45 a.m.	Advanced Asset Management: Strategies for a Stronger Portfolio
11:00 a.m.-12:00 noon	Historical Transitions and Current Strategies for Fixed Income
1:15-2:15 p.m.	Real Estate Investments: Assessing Long-Term Prospects and Risks
2:30-3:30 p.m.	3 for 60 Investment Roundtables
THURSDAY May 1, 2025	
8:30-9:30 a.m.	Analyzing and Identifying Opportunities in Public Equity
9:45-10:45 a.m.	How AI Is Disrupting Markets and Reshaping the Investment Industry
11:00 a.m.-12:00 noon	Designing Effective DC Plans: Aligning Goals and Overcoming Challenges
1:15-2:15 p.m.	Mastering Private Equity: Strategies, Insights and Risk Mitigation
2:30-3:30 p.m.	Decoding Private Credit: Strategies and Insights

All times are listed in Eastern Time.

Breakfasts, lunches and welcome reception included!

Register online by March 17 to save \$300.
www.ifebp.org/investments

Investments Institute

April 30-May 1, 2025

Luminary Hotel & Co. | Fort Myers, Florida

The coming year is set to significantly impact pension investors. As a fiduciary, your role is to capitalize on these changes and maximize investment returns for your plan members. What will a new administration, easing interest rates and favorable jobs data mean for the plans you oversee? The Investments Institute will provide the most relevant sessions led by industry experts, equipping you with the insights, skills and strategies you need to help ensure your fund's long-term success.

Who Should Attend

The Investments Institute is designed for individuals involved in setting investment policy for defined benefit and defined contribution retirement plans, health and welfare plans, and joint apprenticeship and training committees, including:

- Trustees
- Administrators and staff
- Corporate officers and executives
- Finance personnel.

Benefits of Attending

- Learn from highly regarded experts in the field of investing.
- Network with peers who are facing similar challenges.
- Hear current perspectives on the global economy.
- Discuss your fund's strategies with peers from other benefit plans.
- Take advantage of the intimate learning environment and get your specific questions answered.

Top Past Attendee Titles

- Trustee
- President
- Vice President
- Executive Director
- Chairman
- Administrator
- Director
- Managing Director
- Labor Trustee
- Management Trustee

PROGRAM SCHEDULE

All times are listed in Eastern Time.

TUESDAY | April 29, 2025

3:00-5:00 p.m.

Registration/Information

WEDNESDAY | April 30, 2025

7:30-8:15 a.m.

Continental Breakfast *(provided)*

7:30 a.m.-3:30 p.m.

Registration/Information

8:15-9:30 a.m.

Navigating a Transforming Market

Explore what the implications of a new White House administration, the Federal Reserve's interest rate cuts and a strong job market mean for pension plans. Understand how these factors will shape the near-term strategies and opportunities for institutional investors.

9:45-10:45 a.m.

Advanced Asset Management: Strategies for a Stronger Portfolio

Examine advanced techniques in asset management—including diversification, rebalancing and liquidity management—to meet your plan objectives. This session will also explore the roles of different asset classes in optimizing portfolio performance. Understand where your plan is achieving expected returns and how to mitigate risk from market volatility and regulatory uncertainties.

**Register by March 17 to save \$300
with the early registration discount!**

WEDNESDAY | April 30, 2025 *(continued)*

11:00 a.m.-12:00 noon

Historical Transitions and Current Strategies for Fixed Income

This session will review the historical transitions of fixed income markets and their implications for today's investors. Understand the impact of interest rates on portfolios and explore the different sectors, including credit quality and duration, bond prices and yields. Learn how to compare your beginning-year model to your end-of-year model and discover advanced bond trading strategies to improve liquidity and efficiency.

12:00 noon-1:15 p.m.

Lunch *(provided)*

1:15-2:15 p.m.

Real Estate Investments: Assessing Long-Term Prospects and Risks

With rising leverage costs and development expenses, real estate investments are under threat. This panel discussion will examine the long-term prospects of real estate within pension portfolios and explore whether investors need to reassess the risk/return profile of this asset class.

2:30-3:30 p.m.

3 for 60 Investment Roundtables

Engage in three 20-minute, thought-provoking roundtable discussions with attendees about issues important to you and your plans. This session will allow you to interact with and learn from attendees across the country.

3:30-4:30 p.m.

Welcome Reception (Guests Welcome)

Refreshments and light hors d'oeuvres will be served.

THURSDAY | May 1, 2025

7:30 a.m.-3:30 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast *(provided)*

8:30-9:30 a.m.

Analyzing and Identifying Opportunities in Public Equity

Public equity funds have been placed under the microscope recently. This session will dive into how to analyze and identify undervalued and overvalued stocks, and how to manage beta risk. Additionally, it will explore the merits of growth, value and international equity for your portfolios.

9:45-10:45 a.m.

How AI Is Disrupting Markets and Reshaping the Investment Industry

See how artificial intelligence (AI) is transforming asset pricing, trading and portfolio management. Understand the opportunities and challenges of investing in AI-driven companies and technologies. Gain insights into how AI innovations are expected to disrupt markets and reshape the financial industry.

11:00 a.m.-12:00 noon

Designing Effective DC Plans: Aligning Goals and Overcoming Challenges

Learn how to design a DC plan that aligns with both employer and employee goals and expectations. Understand the importance of choice, education and default options in plan design. Discover strategies to overcome behavioral biases and financial illiteracy among DC plan participants.

THURSDAY | May 1, 2025 *(continued)*

12:00 noon-1:15 p.m.

Lunch *(provided)*

1:15-2:15 p.m.

Mastering Private Equity: Strategies, Insights and Risk Mitigation

This session will dive into the intricate world of private equity and explore why companies choose to go private, how to evaluate funds and how funds can mitigate risk while investing in these funds.

2:30-3:30 p.m.

Decoding Private Credit: Strategies and Insights

This session will examine private credit markets, exploring each market's growth to its current size. It will offer insights for investors on how to identify and analyze opportunities across the capital structure, as well as examine recent performance trends and consider future market outlooks.

Register online by March 17 to save \$300.
www.ifebp.org/investments

Hotel Information

Luminary Hotel & Co. Fort Myers, Florida

Name: Luminary Hotel & Co.

Reservation Deadline: March 17, 2025

Rates: US\$249 Single/Double Occupancy (One King Bed)

Hotel Accommodations: You will be charged a \$400 deposit upon registration. Please specify your hotel requirements on the registration form.

For additional hotel information, visit our Hotel/Travel tab at www.ifebp.org/investments

**Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

Hotel Details

The Luminary Hotel & Co. is an exceptional destination nestled in the heart of Fort Myers, Florida. Each room features plush bedding, contemporary furnishings and upscale amenities, including high-speed Wi-Fi, flat-screen TVs and coffee makers. Many accommodations also offer stunning views of the city skyline or the Caloosahatchee River.

Location Details

Situated in the thriving downtown district, Luminary Hotel & Co. provides guests with easy access to Fort Myers' cultural and entertainment hubs. Explore the nearby River District, indulge in local dining or take a stroll along the picturesque waterfront—Everything you need is right at your doorstep.



Sponsorship Opportunities

Sponsors will gain valuable exposure for their organizations when they network with **experienced** trustees, administrators, corporate officers and finance personnel who are involved with setting and managing their investment policies for both defined benefit and defined contribution plans.

Platinum Sponsorship

Exclusive Specialty-Conference Lanyards for a Year!

Opportunity for one organization to sponsor attendee lanyards used at six specialty conferences within the year. Sign up early to take full advantage of this opportunity!



Gold Sponsorships

Conference App, Attendee Lunch OR Specialty Conference Bundle Discount

Sponsor any three or more specialty conferences at the Gold Level within a calendar year and receive a 20% discount on each sponsorship.



Silver Sponsorships

Continental Breakfast



Bronze Sponsorships

Refreshment Break



Sponsorships at each level are recognized in a variety of ways, including on the conference web page and in preconference promotions, on conference signage and table tent cards at the sponsored event, with a company listing in the conference app, with **complimentary or discounted conference registrations, and more!**

Contact us today! Diane Mahler | (262) 373-7656 | dianem@ifebp.org

Learn more at www.ifebp.org/sponsorships.

**Do you also oversee a health fund?
Attend:**

Health Care Management Conference

April 28-29, 2025 | Fort Myers, Florida

A Forward-Looking Approach to Cost Containment

Health fund fiduciaries are presented with a nearly impossible task: offering comprehensive coverage that attains high outcomes, is equitable and is cost effective. Achieving these goals in the face of new therapies; annual, double-digit cost increases; and rapidly expanding technologies can be daunting. This year's conference will take a proactive approach to cost containment, identifying current and future trends that are, and will be, impacting your plan. Conference sessions will be hands-on and practical, combining lecture-based presentations, case studies and roundtable discussions.

MONDAY | April 28, 2025

- **Opening Session:**
The Role of Artificial Intelligence in Health Benefits
- Health Care Legal and Legislative Update
- The State of the Union of GLP-1 Drug Coverage
- Prescription Drug Pipeline Update
- Provider Landscape Update
- Panel Discussion—
The Future of Health Care

TUESDAY | April 29, 2025

- Effective Health Literacy Approaches
- Supporting Women in the Workforce
- The State of the Union of GLP-1 Drug Coverage—Next Steps
- Providing Care for an Aging Population
- Case Study Approaches to Cost Containment
- Identifying and Addressing Your Key Cost Drivers

Save \$500 when you register for both Investments Institute and Health Care Management Conference!

REGISTRATION

Go to www.ifebp.org/investments to register.

CONFERENCE REGISTRATION FEES

Through March 17, 2025—Member: US\$1,750 | Nonmember: US\$1,970

After March 17, 2025—Member: US\$2,050 | Nonmember: US\$2,270

Save \$300 when you register before March 17, 2025.

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%. Hotel deposit is forfeited for cancellations/transfers received within 3 days (8 days for Disney properties) of arrival. Registration fee is forfeited once the program commences. For details, 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, or email continuinged@ifebp.org.



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



Investments Institute

April 30-May 1, 2025

Luminary Hotel & Co. | Fort Myers, Florida

**Register by March 17 to save \$300
with the early registration discount!**



Visit www.ifebp.org/investments to register, or call (888) 334-3327, option 2, for more information.



ED2510799

12.8M-225

Nonprofit Org.
U.S. POSTAGE PAID
INTERNATIONAL FOUNDATION
OF EMPLOYEE BENEFIT PLANS

International Foundation
OF EMPLOYEE BENEFIT PLANS

18700 West Bluemound Road
Brookfield, WI 53045