

Trustees & Administrators Institutes

June 21-25, 2025

Renaissance Nashville Hotel
Nashville, Tennessee

www.ifebp.org/trusteesadministrators

Preconference Options

Mental Health First Aid
at Work

Trustees Institute—
Level II: Concepts in Practice

Main Conference

New Trustees Institute—
Level I: Core Concepts

Advanced Trustees and
Administrators Institute



Nashville, Tennessee

Held in conjunction with
**Accounting and Auditing Institute
for Employee Benefit Plans**
June 23-25, 2025

International Foundation
OF EMPLOYEE BENEFIT PLANS



Trustees & Administrators Institutes

As one of the Foundation's longest running and most popular programs, the **Trustees and Administrators Institutes** offers learning opportunities for **multiemployer** trustees, administrators and plan professionals at all levels. Choose the educational track that meets your needs.

There is one thing you can count on in these challenging times—the International Foundation's commitment to delivering timely, relevant and balanced education on the trends, issues and future direction of the industry that you need to succeed. Don't miss this time-honored educational event—**Register today!**

The main conference runs June 23-25 in Nashville, Tennessee and offers two tracks:

(You must register for one, and there is no cross-attendance allowed between the two tracks.)

- **Advanced Trustees and Administrators Institute** covers hot topics in benefits and is designed for those who have three or more years of experience. See details on page 5.
- **New Trustees Institute—Level I: Core Concepts** is for trustees who are new to serving on a multiemployer trust fund, usually within the first three years of service. Trustees who have served for more than three years but have never attended a Foundation educational program will also benefit from New Trustees Institute—Level I. The course covers the key areas of responsibility in your role as a trustee. See details on page 12.

Held in conjunction with the Accounting and Auditing Institute for Employee Benefit Plans

Encourage your fund accountant and staff to join you in Nashville to get targeted education for their role.

Preconference Educational Opportunities (separate registration required):

- **Trustees Institute—Level II: Concepts in Practice** will be offered on Saturday and Sunday, June 21-22, 2025. This course takes a deeper dive into the content covered in the Level I course. Having the Level II program on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. See details on page 17.
- **The Sunday preconference, Mental Health First Aid at Work**, is offered on June 22, 2025 from 8:00 a.m. to 1:00 p.m. For a full description of the Sunday preconference option, see page 19.

Why You Should Attend

- Fulfill your fiduciary duty or obligation to your clients to be informed and educated on the important issues facing your fund, the employee benefits industry and your members.
- Interact with and learn from industry experts about the current state of affairs, trends and newest initiatives being implemented.
- Meet with industry vendors in the exhibit hall to explore new, innovative products and services that support your plan participants and improve your efficiency.
- Engage and network with peers to learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to consider.
- Bring home helpful resource materials to share with colleagues— from sample documents to checklists and case studies.

The value of your attendance will continue long after you've left the program.

Main Conference Information	Pages 5-15
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PROGRAM AT A GLANCE

PRECONFERENCES			
Trustees Institute— Level II: Concepts in Practice	Saturday, June 21, 2025 —8:00 a.m.-5:00 p.m. AND Sunday, June 22, 2025 —8:00 a.m.-4:00 p.m.		
Mental Health First Aid at Work	Sunday, June 22, 2025 —8:00 a.m.-1:00 p.m.		
ADVANCED TRUSTEES AND ADMINISTRATORS INSTITUTE			
MONDAY June 23, 2025			
7:30-8:45 a.m.	Economic Update		
9:00-10:15 a.m.	Legal, Legislative and Compliance Update		
10:30-11:45 a.m.	Fiduciary Responsibility in Today's Climate	Administrative Challenges	
1:15-2:30 p.m.	Investment Basics Refresher	Family-Supporting Benefits	Maximizing Your Foundation Relationship
2:45-4:00 p.m.	Employee Benefit Plan Audits		
TUESDAY June 24, 2025			
7:30-8:45 a.m.	Hot Topics in Investments	What's Happening in Rx	
9:00-10:15 a.m.	Mental Health Benefits	Driving Cost Containment	
10:30-11:45 a.m.	Using Alternative Plan Design to Recruit and Retain Workers	Best Practices in Working With Your Plan Professionals and Providers	
1:15-2:30 p.m.	Retiree Medical Options	Hot Topics in Retirement	
2:45-4:00 p.m.	Preparing Your Participants for Retirement	Banking 101	
WEDNESDAY June 25, 2025			
7:30-8:45 a.m.	Plan Mergers	Risk Management for Benefit Funds	
9:00-10:15 a.m.	Cybersecurity		
10:30-11:45 a.m.	Artificial Intelligence in Benefits		
NEW TRUSTEES INSTITUTE—LEVEL I: CORE CONCEPTS			
MONDAY June 23, 2025			
7:30-11:30 a.m.	Trustee Responsibility and Legal Environment		
12:30-4:30 p.m.	Investing Health and Welfare and Pension Assets		
TUESDAY June 24, 2025			
7:30-11:30 a.m.	Governance		
12:30-4:30 p.m.	Overview of Health and Welfare Plans		
WEDNESDAY June 25, 2025			
7:30-11:30 a.m.	Overview of Retirement Plans		

Register Today! www.ifebp.org/trusteesadministrators

Advanced Trustees and Administrators Institute

June 23-25, 2025

The Advanced Trustees and Administrators Institute has a long-standing history of providing quality and relevant education to experienced multiemployer trustees and administrators. Immerse yourself in the deeper issues and hot topics of today, and don't forget to look at the preconference options to round out your education.

While this conference is open to all, it is designed for multiemployer trustees and administrators who have served for over three years and have completed the Foundation's New Trustees Institute—Level I: Core Concepts course or the Essentials of Multiemployer Trust Fund Administration course. Plan professionals and service providers have also found value in attending to keep abreast of benefits issues, learn alongside clients and obtain continuing professional education.

Preconference Options—Many attendees of the Trustees and Administrators Institutes find value in attending one of the preconference options on Saturday and/or Sunday. See page 17 for the Trustees Institute—Level II: Concepts in Practice course or page 19 for the Mental Health First Aid at Work session. A separate registration is required for either of the preconference options.

SUNDAY | June 22, 2025

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

(Refreshments and light hors d'oeuvres will be served.)

MONDAY | June 23, 2025

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast/Exhibit Hall Open

MONDAY | June 23, 2025 *(continued)*

7:30-8:45 a.m.

Economic Update

Start your conference with an assessment of the economy so you can better plan for the future. This opening session will provide a postelection economic analysis covering:

- Economic indicators
- Short- and long-term growth prospects
- Jobs
- The global economy.

Speaker: **Anirban Basu, Ph.D.**, Sage Policy Group, Inc.

9:00-10:15 a.m.

Legal, Legislative and Compliance Update

With a new administration in place, this session will provide insights on:

- Postelection impacts on benefits
- Potential retirement legislation
- Potential health care legislation
- Anticipated regulatory activity.

Speaker: **Gary A. Thayer, Esq.**, Archer, Byington, Glennon & Levine LLP

10:30-11:45 a.m. | concurrent sessions

Fiduciary Responsibility in Today's Climate

Review your fiduciary obligations as you consider current issues that require your attention, including:

- Best practices in monitoring and oversight
- Fiduciary litigation
- Succession planning
- Professional trustees.

Speaker: **Paul O. Catenacci, Esq.**, Novara, Tesija, Catenacci, McDonald & Baas PLLC

Administrative Challenges

Join your peers to tackle some of the biggest administrative challenges you face and bring your own discussion topics to add to this list:

- Managing the work-from-home culture
- Administrative efficiency
- Best practices for payroll audits
- Open discussion.

Speakers: **Andrea L. Gibbs, CEBS**, National Employee Benefits Administrators, Inc. (NEBA)
Breanna L. Radtke, Mid-America Carpenters Regional Council Benefit Fund

11:45 a.m.-1:15 p.m.

Lunch/Exhibit Hall Open

REGISTER EARLY TO SAVE!
Register by May 12, 2025 to save \$300.

MONDAY | June 23, 2025 *(continued)*

1:15-2:30 p.m. | concurrent sessions

Investment Basics Refresher

Institutional investing is complex, and it's good to go back and refresh your knowledge of key terms and principles. Bring your questions and be prepared to review:

- Terminology
- Risk and return
- Asset classes
- Understanding data and benchmarks
- Investment policy statements.

Speaker: **Russell D. Kamp**, Ryan ALM, Inc.

Family-Supporting Benefits

In recent years, much attention has been paid to benefits that support families. This session will provide an overview of the more common topics in this area, including:

- What to offer, why and how
- Maternity benefits
- Fertility benefits
- Child care and elder care.

Speakers: **Paula D. Allphin**, Progyny, Inc.
Kate Cigrand, United Actuarial Services, Inc.

Maximizing Your Foundation Relationship

One of your fiduciary responsibilities is to be educated. This session will help you understand how to be deliberate about your learning so you can:

- Get the most out of your education
- Plan your path of education
- Discover the many member benefits available to you
- Access free resources.

Speaker: **Carey Wooton, CEBS**, International Foundation of Employee Benefit Plans

2:45-4:00 p.m.

Employee Benefit Plan Audits

This session is designed to provide a review of the types of audits and key areas involved in benefit plan auditing, including:

- Auditing standards and SOC-1
- Remittance reporting
- DOL, IRS, payroll and internal audits
- Specialty audits.

Speakers: **Jennifer S. Abrams, Esq.**, SWB, PC
Ashleigh Hall, Withum

4:00-5:00 p.m.

Networking Reception/Exhibit Hall Open

(Refreshments and light hors d'oeuvres will be served.)

TUESDAY | June 24, 2025

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast/Exhibit Hall Open

7:30-8:45 a.m. | concurrent sessions

Hot Topics in Investments

Immerse yourself in learning about some of the key issues in investing today, including:

- Private equity
- Bitcoin
- Valuations
- Fees
- Unrelated business taxable income (UBTI).

Speaker: **To Be Announced**

What's Happening in Rx

Learn about the latest trends in Rx and take away strategies to control costs as you discuss:

- Managing your PBM
- Design trends
- Injectables and infusions
- Specialty drugs
- GLP-1 drug craze.

Speaker: **Susan A. Hayes**, Pharmacy Investigators and Consultants

9:00-10:15 a.m. | concurrent sessions

Mental Health Benefits

The mental health crisis combined with the legal and regulatory environment has led to an increase in mental health awareness and benefits. This session will help you understand:

- Coverage options—Access and design
- Legal issues
- The role of wellness and well-being in mental health
- Spotlight on successful programs.

Speaker: **Nancy Spangler, Ph.D.**, Spangler Associates, Inc.

Driving Cost Containment

Come prepared to contribute to the conversation about finding opportunities to contain your escalating costs as you consider:

- What data you need and what it tells you
- Design options
- Educating members

Speaker: **Nick Kingsley**, Horizon Actuarial Services, LLC

TUESDAY | June 24, 2025 *(continued)*

10:30-11:45 a.m. | concurrent sessions

Using Alternative Plan Designs to Recruit and Retain Workers

Alternative plan designs have garnered much attention in recent years. This session will frame a conversation about how these plans can be a recruitment and retention tool. Topics include:

- New trends in plan design
- Risk and return
- Options that are attractive to employers and participants
- Pros and cons of variable benefit plans.

Speakers: **Linda M. Josephson**, Barlow Coughran Morales & Josephson, P.S.
Jason L. Russell, Segal

Best Practices in Working With Your Plan Professionals and Providers

Your plan professionals and providers are your partners in delivering benefits efficiently to your members. However, you must actively manage those relationships. This session will address:

- Monitoring and oversight
- Making a change
- Request for information and request for proposals
- Timing
- Performance guarantees.

Speakers: **Mark E. Belland, Esq.**, O'Brien, Belland & Bushinsky, LLC
Jonathan D. Levine, CEBS, I.E. Shaffer & Co.

11:45 a.m.-1:15 p.m.

Lunch/Exhibit Hall Open

1:15-2:30 p.m. | concurrent sessions

Retiree Medical Options

Stay up to date on the latest options for providing medical coverage for your retirees as you discuss:

- The future of providing retiree coverage
- Exchange options
- Health reimbursement arrangements (HRAs).

Speaker: **Suzanne Taranto**, Milliman Inc.

Hot Topics in Retirement

Come prepared to discuss the common issues that plan sponsors are dealing with in retirement plans. Sample topics include:

- Administering ARPA funds
- Legal fees
- Qualified domestic relations orders (QDROs)
- Managing timely 401(k) contributions in a multiemployer plan.

Speakers: **Jay K. Egelberg**, First Actuarial Consulting, Inc. (FACT)
James K. Estabrook, Esq., Lindabury, McCormick, Estabrook & Cooper, P.C.

TUESDAY | June 24, 2025 *(continued)*

2:45-4:00 p.m. | concurrent sessions

Preparing Your Participants for Retirement

Share the strategies you use and learn from others about the best ways to educate and prepare your plan participants for retirement. Topics include:

- Education for early-, mid- and late-career workers
- Early retirement options
- Health care in retirement
- Other issues to consider.

Speakers: **Jeffrey R. Greendorfer**, Stratford Associates, LLC
Bethany R. Marshall, CEBS, National Football League Players Association (NFLPA)

Banking 101

Have you ever considered the services and value that your banking relationship provides to the fund? This session will address:

- Custody
- Banking products
- Cash sweep accounts
- How to effectively manage your banking.

Speakers: **James Sher**, Union Bank & Trust
Brandon Padget, Union Bank & Trust

REGISTER EARLY TO SAVE!
Register by May 12, 2025 to save \$300.

WEDNESDAY | June 25, 2025

6:30-11:45 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m. | concurrent sessions

Plan Mergers

In the right situation, plan mergers can be a win-win for all. This session will help you understand the key considerations, challenges and strategies to make a merger successful. Topics include:

- Why consider a plan merger?
- Goals
- Pros and cons
- How to make a plan merger happen
- Health mergers
- Retirement mergers.

Speakers: **Jason L. Franken**, Foster & Foster Consulting Actuaries, Inc.
Travis R. Smith, Foster & Foster Consulting Actuaries, Inc.

Risk Management for Benefit Funds

Take a strategic look at your exposures and consider strategies to mitigate your risk as you learn:

- Areas of risk
- Fiduciary issues
- Insurance coverage options
- Strategies to manage risk.

Speaker: **Sally B. Corbin**, Segal

9:00-10:15 a.m.

Cybersecurity

Having a robust approach to cybersecurity is an imperative to protect your trust fund assets and participant data. This session will address:

- Threats: Common exposures and fraud
- Policies and insurance
- Penetration testing
- What to do when you have a breach
- Best practices and DOL guidelines

Speaker: **Gabrielle D. Fox**, Proskauer Rose LLP

10:30-11:45 a.m.

Artificial Intelligence in Benefits

Artificial intelligence (AI) is in the news daily, and it seems like it's everywhere. The purpose of this session is to consider how AI can be used in benefits and discuss:

- Threats and opportunities
- Practical applications in the fund office
- Policies
- Trends.

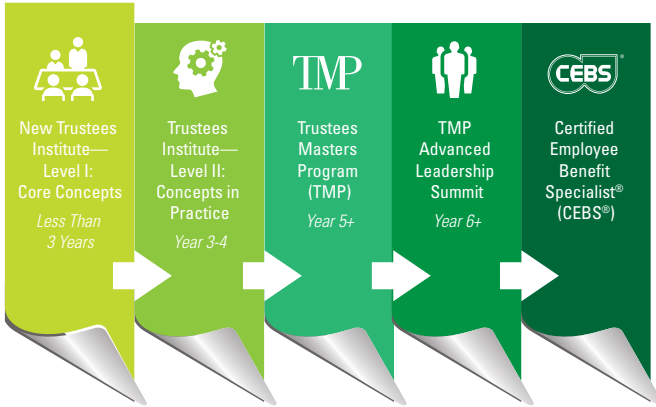
Speaker: **To Be Announced**

New Trustees Institute— Level I: Core Concepts

June 23-25, 2025

Designed for Taft-Hartley multiemployer benefit plan trustees, New Trustees Institute—Level I: Core Concepts encompasses five modules that cover 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. Content is for those in their first three years of serving on a multiemployer trust fund or trustees who have not previously attended a Foundation education program. This course is also ideal for collective bargaining and other personnel who work with trustees and want a better understanding of their role and responsibilities.

U.S. Multiemployer Trustee Path | www.ifebp.org/newtrustees



Note: New Trustees Institute—Level I: Core Concepts is also offered each year as a preconference to the U.S. Annual Employee Benefits Conference. In 2025, the Institute will be held November 7-9 in Honolulu, Hawai'i.

Preconference Option

Many attendees of the New Trustees Institute—Level I: Core Concepts program find value in attending the Sunday preconference session as well. See page 19 for the session entitled Mental Health First Aid at Work. A separate registration fee is required for this preconference option.

New Trustees Institute—Level I: Core Concepts Faculty

Troy Brown, CFA
Managing Director,
Institutional
Advisory Services
Mariner Institutional

Becky J. Drews
Vice President
United Actuarial
Services, Inc.

Ian W. Jones
Senior Investment
Advisor
Mariner Institutional

Ron Laudel
Benefit Plans
Administrator (Retired)
Mid-America Carpenters
Regional Benefit
Services

Michael Ledbetter,
CEBS
Partner
Ledbetter Partners LLC

Robert M. Projansky,
Esq.
Partner
Proskauer Rose LLP

Peter M. Rosene, Esq.
Shareholder
Reinhart Boerner
Van Deuren s.c.

Aaron Slaughter, CPA
Partner
Withum

SUNDAY | June 22, 2025

7:30-8:00 a.m.

Sunday Preconference Registration

(for those who are registered)

8:00 a.m.-1:00 p.m.

Preconference Workshop: Mental Health First Aid at Work

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

(Refreshments and light hors d'oeuvres will be served.)

MONDAY | June 23, 2025

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast/Exhibit Hall Open

7:30-11:30 a.m.

Trustee Responsibility and Legal Environment

- History of benefits/legislation
- Governing documents
- Fiduciary responsibilities under ERISA
- Relationship of trustees and parties to the collective bargaining agreement
- Conducting effective trustee meetings

11:30 a.m.-12:30 p.m.

Lunch/Exhibit Hall Open

12:30-4:30 p.m.

Investing Health and Welfare and Pension Assets

- Investing process
- Investment terminology
- Risk and return
- Investment objectives and policy
- Asset classes
- Asset allocation
- Market performance
- Selecting managers and monitoring performance

4:30-5:00 p.m.

Networking Reception/Exhibit Hall Open

(Refreshments and light hors d'oeuvres will be served.)

TUESDAY | June 24, 2025

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast/Exhibit Hall Open

7:30-11:30 a.m.

Governance

- Financial statements
- Internal controls
- Administration
- Documents, records and meeting minutes
- Working with plan professionals
- Communication
- Best practices.

11:30 a.m.-12:30 p.m.

Lunch in Exhibit Hall

12:30-4:30 p.m.

Overview of Health and Welfare Plans

- Overview of health and welfare programs
- Plan funding
- Plan design
- Administration and financing metrics
- Communication needs and requirements
- Data collection and analysis
- Cost-control initiatives
- Health care reform, legal/legislative developments

WEDNESDAY | June 25, 2025

6:30-11:30 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-11:30 a.m.

Overview of Retirement Plans

- Purpose and objectives
- Actuarial concepts
- Administration
- Manage the money
- Defined benefit pension plans
- Defined contribution and hybrid plans
- Accounting changes
- Market performance
- Legal and legislative developments
- The future of retirement

Register online at www.ifebp.org/trusteesadministrators.

Educated Trustees Are Your Fund's Largest Asset

As trustees and administrators, you are the leaders responsible for the protection of plan assets and delivering the benefits that give your members health and financial security. Just as you share these responsibilities with each other, so too should you share your educational experiences. Consider attending this year's Trustees and Administrators Institutes as a team, and invite your plan professionals, too. With multiple tracks, you can get the education you need for all your leaders, tailored to each person's experience and role.

For more information or to register, visit www.ifebp.org/trustees.

We look forward to seeing you all in Nashville!



Accounting and Auditing Institute for Employee Benefit Plans

June 23-25, 2025 | The Renaissance Nashville | Nashville, Tennessee
Virtual option available

Having the Trustees and Administrators Institutes and the Accounting and Auditing Institute for Employee Benefit Plans co-located in Nashville provides the opportunity for members in your organization to connect and network with other plan professionals, trustees and fund administrators. The program offers focused learning on the technical topics of greatest concern to the accounting and auditing profession. Learn best practices, interact with other professionals who face similar issues and fulfill your need for continuing professional education.

Benefits of Attending

- Get the most up-to-date information on plan disclosure requirements.
- Understand the current issues that impact multiemployer pension and health and welfare plan audits.
- Network with your peers who face similar challenges, and brainstorm workable solutions.
- Take the opportunity to earn meaningful continuing professional education (CPE) credits.

PROGRAM AT A GLANCE

SUNDAY June 22, 2025	
8:00 a.m.-1:00 p.m.	Preconference Session: Mental Health First Aid at Work
MONDAY June 23, 2025	
7:30-8:45 a.m.	Economic Update*
9:00-10:15 a.m.	Legal, Legislative and Compliance Update*
10:30-11:45 a.m.	DOL Update
1:15-2:30 p.m.	Accounting and Auditing: Key Updates and Insights for 2025
2:45-4:00 p.m.	Building the Audit Team
TUESDAY June 24, 2025	
7:30-8:45 a.m.	Mastering Project Management: Essential Skills for Success
9:00-10:15 a.m.	Beyond the Payroll Audit—Impact on Financial Statements
10:30-11:45 a.m.	Why Does Audit Planning Matter?
1:15-2:30 p.m.	Recognizing and Mitigating the Latest Fraud Schemes
2:45-4:00 p.m.	Guided Open Forum
WEDNESDAY June 25, 2025	
7:30-8:45 a.m.	Working With the Fund Office: What Fund Staff and Accountants Want From Auditors
9:00-10:15 a.m.	Leveraging AI in Accounting
10:30-11:45 a.m.	Addressing Industry Challenges: Sharing Best Practices and Building Community

**This session is a joint session with the Advanced Trustees and Administrators Institute.*

Two-Day Preconference Course

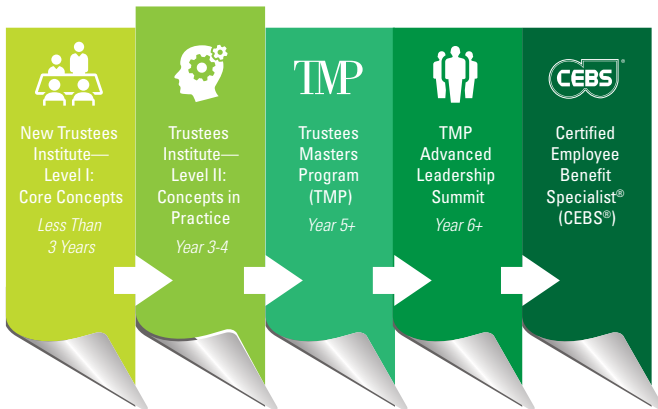
Trustees Institute— Level II: Concepts in Practice

June 21-22, 2025

Trustees Institute—Level II: Concepts in Practice is designed for Taft-Hartley multiemployer benefit plan trustees with three or more years of experience who have completed New Trustees Institute—Level I: Core Concepts. The curriculum will take a deeper dive into the benefits industry and your oversight role, with a focus on practical application. This highly interactive learning experience will give you the framework and tools you need to address the many challenges you face as a trustee.

Having Trustees Institute—Level II: Concepts in Practice on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. Please note that a separate registration is required to attend both the Trustees Institute—Level II: Concepts in Practice and the Advanced Trustees and Administrators Institute.

U.S. Multiemployer Trustee Path | www.ifebp.org/trusteeslevel2



Note: Trustees Institute—Level II: Concepts in Practice is also offered each year as a preconference to the U.S. Annual Employee Benefits Conference. In 2025, the Institute will be held November 8-9 in Honolulu, Hawai'i.

Trustees Institute—Level II: Concepts in Practice Faculty

Lee Centrone
Senior Vice President
BeneSys

Kevin Culp, EA, FSA, MAAA
Senior Consulting Actuary
Horizon Actuarial Services, LLC

David P. Dorsey, CPA
Partner
Withum

**Mary Ann T. Dunleavy,
ASA, EA, MAAA**
Consulting Actuary
Horizon Actuarial Services, LLC

Michael D. Joyce, Esq., CEBS
Senior Vice President and
Senior Investment Consultant
Segal Marco Advisors

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

**Stephanie Patrick,
FSA, MAAA**
Senior Consulting Actuary
Horizon Actuarial Services, LLC

Andrew E. Staab
Vice President and
Senior Corporate Counsel
U.S. Bank National Association

Nick S. Trella
Senior Vice President/Principal
Segal Marco Advisors

SATURDAY | June 21, 2025

7:00 a.m.-5:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00 a.m.-12:15 p.m.

Governance/Administration

- Fiduciary duty
- Policies and procedures
- Group scenarios
- Prohibited transactions
- Deadlocks and arbitration
- Board governance
- Fraud prevention detection

12:15-1:00 p.m.

Lunch

1:00-5:00 p.m.

Investments

- Terminology and reports
- Who are the players? What are their roles?
- Asset allocation
- Other investment issues
- Alternative investment options
- Investment open forum

SUNDAY | June 22, 2025

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00-11:30 a.m.

Retirement

- Financial literacy
- DC plans/annuities
- Pension basics
- PPA-MPRA
- Plan redesign
- Withdrawal liability
- Open forum

11:30 a.m.-12:15 p.m.

Lunch

12:15-4:00 p.m.

Health Plans

- Health plan basics
- Appeals committee
- Prescriptions and mental health
- Monitoring and selecting service providers
- Rapid-fire Q&A
- Emerging issues

Trustees Institute—Level II: Concepts in Practice Fees

Save \$300 when you register by May 12.

Through May 12, 2025
Member: \$1,750 | Nonmember: \$2,080

After May 12, 2025
Member: \$2,050 | Nonmember: \$2,380

One-Day Preconference Workshop

Mental Health First Aid at Work

Sunday, June 22, 2025 | 8:00 a.m.-1:00 p.m.

Mental Health First Aid 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 Mental Health First Aid at Work action plan (ALGEE).
- Discuss appropriate methods of self-care for individuals in the workplace.

Register Early to Save \$150

Save \$150 when you register by May 12.

Through May 12, 2025
Member: \$540 | Nonmember: \$650

After May 12, 2025
Member: \$690 | Nonmember: \$800



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

Renaissance Nashville Hotel

Nashville, Tennessee
June 21-25, 2025

The June Trustees and Administrators Institutes will be held at the Renaissance Nashville Hotel, a stylish haven in legendary Nashville, Tennessee. Boasting modern and inspiring features, this Music City hotel is in the heart of downtown, attached to Fifth + Broadway, and steps from attractions such as Bridgestone Arena and Ryman Auditorium. Recharge with plush bedding, expansive workstations and striking views of downtown Nashville. Delight your palate with handcrafted Southern fare at the signature restaurant Little Fib. Designed to reflect the history and spirit of the city, this luxury hotel in downtown Nashville invites you to discover the difference.

Reservation Deadline: Monday, May 12, 2025

Rate: \$324 single/double occupancy

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/trusteesadministrators.

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



Exhibit 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 June Trustees and Administrators Institutes.

Contact Us!

For Exhibits

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

For Sponsorships

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

75%

of attendees at the Trustees and Administrators Institutes **do not** attend the Annual Conference, exposing you to a new audience.

Benefits of Exhibiting at the Trustees and Administrators Institutes

The exhibit hall at the Trustees and Administrators Institutes is structured specifically to build valuable connections with attendees. As an exhibitor, you will:

- Reach a concentrated audience of over 400 trustees, administrators and plan professionals who serve multiemployer benefit plans
- Build relationships among those who do not attend the Annual Conference (75% of attendees at the Trustees and Administrators Institutes do not attend the Annual Conference)
- Secure quality leads—Attendees at the Trustees and Administrators Institutes are decision makers who can directly impact your bottom line
- Learn about the issues impacting your clients today by participating in educational sessions and networking with peers.



Each Exhibit Space Includes:

- Two complimentary registrations
- Company listing on the conference app
- Exhibitor recognition on the Foundation website.

Continental breakfasts, lunches and receptions are served in the exhibit hall. There are limited exhibit spaces available!

Come Visit With Us!

The International Foundation of Employee Benefit Plans will have a booth at this year's June Trustees and Administrators Institutes. Our on-site experts are here to answer any questions and talk with you about additional educational opportunities that are right for you.

Ready to Learn More? Request a **2025 Exhibitor Prospectus** for full details. Contact Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Sponsorship Opportunities

Benefits of Sponsoring the Trustees and Administrators Institutes

Sponsorship opportunities are designed to give you maximum value for your dollar before, during and even after the conference. As a sponsor, you will:

- Expand your brand recognition among a valuable audience who can increase your business revenue
- Gain a competitive advantage by meeting with attendees in person, answering their questions and hearing about the issues of greatest concern to them
- Receive exposure on our conference web page and in preconference promotions; in large-scale, on-site signage and a display of your company brochure; with a company listing on the conference app and in the Foundation's Service Provider Directory (located on the website homepage); and more!

Platinum Sponsorship

Exclusive Specialty-Conference Lanyards for a Year

Opportunity for one organization to sponsor attendee lanyards used at specialty conferences within the year (does not include HBCE, Art & Science of Health Promotion Conference, CONNECT or Annual Wellness Summit). Request a sponsor brochure for more details.



Gold Sponsorships

Three options to choose from:

Attendee Luncheon

Exclusive Sponsorship of Conference App

Your company logo appears on splash screen each time attendees open the app.

Attendee luncheon and conference app sponsorship include one complimentary and one discounted conference registration.



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.

This includes one complimentary conference registration at each sponsored conference.



Silver Sponsorship

Continental Breakfast

Includes one complimentary conference registration

Bronze Sponsorship

Refreshment Break

Includes one conference registration at a 50% discount



Ready to Learn More? Request a **2025 U.S. Sponsorship Opportunities** brochure for full details. Contact Diane Mahler | (262) 373-7656 | dianem@ifebp.org

REGISTRATION

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

CONFERENCE REGISTRATION FEES

Advanced Trustees and Administrators Institute and New Trustees Institute—Level I: Core Concepts

Save \$300 when you register by May 12.

Through May 12, 2025	After May 12, 2025
Member: \$1,750 Nonmember: \$2,080	Member: \$2,050 Nonmember: \$2,380

Separate registration for the preconferences is required.

Two-Day Preconference Course:

Trustees Institute—Level II: Concepts in Practice

Save \$300 when you register by May 12.

Through May 12, 2025	After May 12, 2025
Member: \$1,750 Nonmember: \$2,080	Member: \$2,050 Nonmember: \$2,380

Sunday Preconference Workshop: Mental Health First Aid at Work

Save \$150 when you register by May 12.

Through May 12, 2025	After May 12, 2025
Member: \$540 Nonmember: \$650	Member: \$690 Nonmember: \$800

POLICIES

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 days (eight days for Disney properties) of arrival. 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 request CE credit with your registration for the program 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 us at continuinged@ifebp.org.



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

INTERNATIONAL FOUNDATION MISSION

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.



Join us in June for this valuable education!

Trustees & Administrators Institutes



June 21-25, 2025

Renaissance Nashville Hotel,
Nashville, Tennessee

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

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International Foundation *if*
OF EMPLOYEE BENEFIT PLANS

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Brookfield, WI 53045

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