

# EMPLOYEE PENSIONS AND BENEFITS EDUCATION 2025

TRAINING

RESEARCH

COMMUNITY

PROFESSIONAL  
DEVELOPMENT

# The Actions of Our Pensions and Benefits Community Impact the Lives of Millions of Workers

*Let the International Foundation fuel your work through education.*

## WHY CHOOSE THE FOUNDATION?

If you work in employee pensions and benefits, no day is ever the same. The last thing you want to do is spend your time researching where to find vetted, impartial, quality education and information to stay compliant and informed. Since 1954, the Foundation has been the largest organization for employee benefits education. We offer:

- Content developed and delivered by leaders who actually work in the field and relate to the day-to-day challenges you face
- Unique networking opportunities, so you can meet and share ideas with others who understand your role
- Clear tools and takeaways, with a wide range of educational options and delivery methods to choose from
- Timely information so you can respond quickly to changing laws, regulations and industry trends.

## BE PART OF SOMETHING BIG

Choose from **over 20** in-person conferences and courses

Learn from wherever you are through **4** virtual conferences

Brush up on important topics through **8** e-learning courses

Dig into the details through **10** toolkits

Find **11** in-person opportunities to train specifically for your role

Demonstrate your commitment to the industry with **3** professional designations

Benchmark your plans through **survey reports**

Learn from an organization with **70 years** of pensions and benefits education experience

Stand out with **7** certificates (in person or online)

Tune into **20+** new webcasts

# GET THE MOST FROM THIS CATALOGUE

First, identify what sector you best represent, depending on your role. You'll notice these symbols throughout so you can easily identify the programs designed for you:

## CP CORPORATE PLAN SPONSORS

These are benefit plans maintained by one employer.

**Industries represented:** Wide-ranging—technology, retail, energy, manufacturing

**Example roles/titles:** Benefits Manager, Director of Health Care Strategy, Senior Director of Human Resources, Director of Global Benefits, Director of Retirement Services, Benefits Analyst, Vice President, Director of Compensation and Benefits

## G GLOBAL

These are multinational employers responsible for international global benefits management.

**Example roles/titles:** Global Benefits Specialist; Manager, International Benefits; Senior Manager, Global Benefits; Global Benefits Consultant; International Benefits Consultant; Senior Director, Global Benefits; Senior Global Benefits Analyst; Manager Benefit Operations, North America

## ME MULTI-EMPLOYER PLANS

These benefit plans are the result of a collectively bargained plan, to which more than one employer contributes, and typically involve one or more local unions.

**Industries represented:** Construction-dominated, also hospitality/service, entertainment

**Example roles/titles:** Trustee, Labour Relations Director, Executive Director, Fund Administrator, Business Manager, Training Coordinator, Secretary-Treasurer

## PE PUBLIC EMPLOYER PLANS

These are benefit plans established for employees of a federal, state, provincial and/or local government as well as those who work for publicly funded organizations such as police or fire systems, school systems and universities.

**Systems represented:** Provincial and local systems; school systems; safety (police and fire) systems

**Example roles/titles:** Executive Director; Director, Health Care; Director, Member Benefits; Chief Investment Officer; Trustee; Board Member; City Manager; Plan Administrator

**Also note the different delivery methods of education throughout:**

In-person  
conferences/  
courses

Training  
for your role

In-person  
certificates

Online  
certificates

E-learning  
courses

SAVE THE  
DATE!



**A can't-miss event  
for Canadian corporate  
plan sponsors!**



Earn up to 19 CEBS®  
Compliance credits!

44TH ANNUAL

**ISCEBS Employee Benefits**

*Symposium*

September 14-17, 2025 | Hyatt Regency Minneapolis | Minneapolis, Minnesota

PARTNERS IN EDUCATIONAL EXCELLENCE

[www.ifebp.org/symposium](http://www.ifebp.org/symposium)

**International Society**  
of Certified Employee Benefit Specialists

**International Foundation**  
OF EMPLOYEE BENEFIT PLANS 

SAVE THE  
DATE!

2025  
58TH ANNUAL  
CANADIAN

# EMPLOYEE BENEFITS CONFERENCE

November 23-26, 2025  
Hilton San Diego Bayfront  
San Diego, California  
Preconferences: November 21-23



[www.ifebp.org/canannual25](http://www.ifebp.org/canannual25)

International Foundation  OF EMPLOYEE BENEFIT PLANS CANADA

# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## Institute for Apprenticeship, Training and Education Programs



*Preconference available*

January 13-15, 2025 | Orlando, Florida  
Virtual option available

Learn about efficient trust fund management and best practices for apprenticeship programs in Canada and the United States. This conference will address the current and relevant issues that are impacting your program, providing the clarity you need to plan for the future. Learn from experts and share ideas, opportunities and lessons learned with your peers so you return with actionable plans to implement.

### Why You Should Attend

- Learn best practices in the management of your fund and running your training program.
- Understand legal and regulatory requirements.
- Discover strategies to avoid mistakes and reduce risks for your fund.
- Take away best practices for succession planning and creating the next generation of leaders.
- Learn more about mental health and substance use in your program.



## Canadian Health and Wellness Innovations Conference



*Preconference available*

February 24-26, 2025 | Rio Grande, Puerto Rico

In this fast-changing landscape, the concept of wellness needs to encompass not just physical health but also mental, emotional and social well-being. Employers, unions and trustees must collaborate to address the unique challenges faced by the evolving workforce, taking into account the diverse needs and experiences of their employees. Inclusivity is crucial in wellness initiatives within health plans and the members you represent. To foster a more resilient and productive workplace, policies must adapt and innovate to remain relevant to all employees.

### Why You Should Attend

- Learn firsthand about the latest trends in health and wellness that could be important to your plan design.
- Find out how others have successfully introduced wellness initiatives to their members.
- Discover ways to motivate plan participants to take part in the shared responsibility for their own health.



## 35th Annual Art & Science of Health Promotion Conference



*Intensive Training Seminars available*

April 2-4, 2025 | Scottsdale, Arizona

This conference narrows the gap between research and practice by facilitating dialogue and encouraging meaningful collaborations between practitioners and scientists from corporate, clinical, education policy and entrepreneurial spheres.

### Why You Should Attend

- Join other health promotion and wellness professionals to learn, share and connect.
- Be inspired and equipped to bring new practices and approaches to your health promotion efforts.
- Find support in creating programs and resources that meet the needs of a diverse, multigenerational workforce.
- Learn strategies for raising awareness, building skills, and promoting policies and practices that foster population health and well-being, including more positive and supportive interactions.

# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## Canadian Legal and Legislative Update

ME PE CP

*Preconference available*

May 14-15, 2025 | Winnipeg, Manitoba

Stay up to date on the latest legal and regulatory updates impacting your plans by attending the Canadian Legal and Legislative Update. This conference is relevant for trustees, plan sponsors, public employees and service providers. You will not want to miss the conference providing the latest updates on need-to-know information that will help your organization sail smoothly throughout the upcoming year.

### Why You Should Attend

- Focus on the critical information you need to know now with fresh and relevant topics.
- Gain a deeper understanding of the issues affecting the pensions and benefits industry and their impact on your funds.
- Take advantage of opportunities to network with your peers.



## Séminaire sur la gestion des caisses de retraite - 25<sup>e</sup> édition

ME PE CP

29 mai 2025 | Montréal, Québec

Des noms renommés du Québec dans les domaines de l'investissement, de l'économie et de la géopolitique partageront leurs stratégies pour faire face aux impacts anticipés sur les marchés financiers. Vous découvrirez les dernières innovations en matière d'investissement et de gestion des risques liés aux pensions.

À un moment où les facteurs sociopolitiques ont un impact majeur sur la gestion des portefeuilles, le Séminaire sera un événement incontournable pour les membres de la communauté financière québécoise.

### Pourquoi y assister ?

- Apprenez des stratégies qui pourraient être bénéfiques pour votre fonds de retraite.
- Découvrez de nouvelles approches à mettre en œuvre pour améliorer vos résultats financiers.
- Vous familiariser avec les enjeux et les tendances les plus récents et vous préparer pour l'avenir.
- Rencontrer d'autres professionnels de l'industrie.



## EVOLVE Benefits and Workforce Strategies Summit

PE CP

June 24-26, 2025 | Niagara-on-the-Lake, Ontario

This dynamic conference for Canadian HR, pensions and benefits leaders will cover the latest trends to attract, retain and support your workforce. Learn innovative strategies during impactful sessions led by industry experts and connect with your peers through unique networking opportunities.

### Why You Should Attend

You'll have plenty of opportunities to share your views, get your questions answered and network with other professionals, including:

- Panel discussions with industry experts
- "Speed-dating-style" roundtables on hot topics
- Real-life case studies from leading organizations.

# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## Fraud Prevention Institute for Employee Benefit Plans

July 14-15, 2025 | Chicago, Illinois



Fraud can happen at any time, and it can cause major damage. Uncover emerging trends in fraud prevention, learn the latest in cybersecurity and data breaches, and receive guidance for internal controls and risk prevention.

### Why You Should Attend

- Gain an understanding of where risks lie in your plan.
- Learn who may be potential fraudsters.
- Discover the steps to take and tips to immediately prevent fraud in your plan.
- Understand cyber-risks and key mitigation strategies.



## Canadian Public Sector Pensions and Benefits Conference

*Preconference available*

July 22-23, 2025 | Montréal, Québec



Gain skills to tackle the unique challenges encountered by public sector plans. Conference sessions offer innovative solutions to ensure the viability of your pension and health and welfare funds. Engaging sessions and open forums provide practical solutions and insights for the issues plans are facing. Attendees can ask questions, gather feedback from content experts and learn from other attendees. Register for this valuable two-day conference and explore plan design, governance and communication strategies for public sector pensions and benefits.

### Why You Should Attend

- Learn from leading pension and benefits professionals about the specific issues you face in your role.
- Experience learning from a forum of your peers and discover best practices in other systems.
- Hear about strategies that could save your fund money in the short and long term.



## Designing Curriculum to Close the Skills Gap

July 22-23, 2025 | Brookfield (Milwaukee), Wisconsin



This two-day, hands-on workshop will help seasoned and new professionals improve the development, delivery and evaluation of learning by providing a proven process to incorporate into their apprenticeship programs. Upon completion, participants will understand and be able to apply a systematic approach—based on the Developing a Curriculum (DACUM) model—to deliver a more impactful apprenticeship program.

### Why You Should Attend

- Learn how to improve apprenticeship program performance with greater learner efficiency, effectiveness and engagement.
- Gain a foundation in analysis to ensure your training initiatives are aligned and have the impact you and your program expect.
- Build a curriculum road map that will prepare your program for success today and in the future.



# IN-PERSON CONFERENCES/COURSES

[www.ifebp.org/education](http://www.ifebp.org/education)



## Canadian Investment Institute

September 8-10, 2025 | St. John's, Newfoundland and Labrador



Stay on top of the latest trends to maximize returns for the plan dollars you oversee. Attend the Canadian Investment Institute, and learn from leading-edge investment experts and economic professionals who provide a strategic mix of investment sessions and opportunities to interact with speakers and your peers. If you are involved in plan investing, this program is a must-attend conference to fully understand the potential available for your fund's future successes.

### Why You Should Attend

- Learn from leading-edge investment and economic professionals in Canada.
- Choose from a unique mix of investment workshops that provide enhanced opportunities for interaction with speakers.
- Hear what other funds are doing and why.



## 44th Annual ISCEBS Employee Benefits Symposium

September 14-17, 2025 | Minneapolis, Minnesota



Learn from industry colleagues, experts and leaders during this can't-miss event for corporate benefits professionals, benefits consultants, fund administrators and public plan employees.

### Why You Should Attend

- Maintain a competitive and engaging benefits knowledge.
- Learn strategies for a strong, comprehensive benefits approach.
- Gain connections to propel your career forward.



## 58th Annual Canadian Employee Benefits Conference

*Preconferences: November 21-23, 2025*

November 23-26, 2025 | San Diego, California



For over 50 years, the Annual Canadian Employee Benefits Conference has been the premier source of comprehensive education needed to run benefit and pension plans effectively. Join us in San Diego for unbiased, objective education on upcoming trends, legislative changes and key topics impacting your fund. Gain the latest tools, ideas and strategies for making effective decisions on behalf of your plan members. Hear from experts in the industry, network with benefits professionals and share strategies on managing the funds you serve.

### Why You Should Attend

- Choose from a plethora of engaging sessions covering a wide range of issues and trends across pensions, benefits, investments, administration and more.
- Get the guidance you need from experts in the industry to manage your plans effectively today and prepare them for what's to come.
- Walk away with a fresh perspective and new ideas.
- Select sessions will be offered in French.



## Sponsorship and Exhibitor Opportunities

Opportunities are available for many of the events listed.  
See page 20 for more information.



# TRAINING FOR YOUR GLOBAL BENEFITS ROLE

[www.ifebp.org/global](http://www.ifebp.org/global)

## GLOBAL

The Foundation has curated a suite of global benefits education programs to provide the knowledge and skills needed to effectively manage a multinational workforce. From a live, instructor-led virtual training program to the culminating CONNECT event, this combination of learning opportunities is designed to set global professionals up for success in their role.



### Certificate in Global Benefits Management

February 24-28, 2025 | San Diego, California  
July 14-18, 2025 | Chicago, Illinois

Gain the comprehensive knowledge needed to administer and manage a global benefits program. Receive a solid foundation of international benefits and regional benefits overviews of Europe, Latin America, Asia Pacific, the Middle East and Africa. Receive intensive training over 4½ days of instruction, allowing you to complete the certificate program in one trip.



### CONNECT Global Employee Benefits and Workforce Strategies Summit

July 21-23, 2025 | Dallas, Texas

CONNECT is tailor-made to help multinational employers understand key issues, trends and solutions for developing and maintaining a global total rewards strategy. Through real-life case studies, roundtable discussions, breakout sessions, an interactive resource/solutions center and a host of networking opportunities, this premier event is designed to connect the growing community of global professionals.



### Certificate in Canadian Benefit Plans

October 6-8, 2025 | Austin, Texas

This offering provides a solid introduction to Canadian employee benefits, pensions and human resources practices. Whether you work directly with a Canadian plan or are employed by a U.S. company with affiliates in Canada, you will gain practical and useful information about the Canadian pensions and benefits landscape.



### Global Benefits Fundamentals

Date TBA | Virtual Workshop

This live virtual workshop is for those new to global employee benefits, including those who have significant benefits experience in their home country but limited exposure to benefits at a multinational company.



# EDUCATION PATH FOR CANADIAN TRUSTEES

[www.ifebp.org/cdtrusteepath](http://www.ifebp.org/cdtrusteepath)

The Canadian trustee education path—Foundations of Trust Management Standards (FTMS®), Advanced Trust Management Standards (ATMS™), Master of Trust Management Standards (MTMS) and MTMS Advanced Leadership Summit—provides clear, cohesive training for all experience levels.

Together, FTMS, ATMS and MTMS provide the ideal blend of knowledge, skills and experience needed for effective management of trusts. Past attendees recommend leaving time between each step on the path to apply what you've learned in the classroom to real-life situations.



## Foundations of Trust Management Standards (FTMS)

July 20-21, 2025 | Montréal, Québec

November 21-22, 2025 | San Diego, California

The first step in the trustee education path is focused on the needs of new Canadian multi-employer, public and corporate sector plan trustees. FTMS will help you understand the health and retirement needs of plan members while increasing your knowledge and awareness in the key areas of effective trust management: legal and regulatory issues, administration, governance and funding/investment/finance.



## Advanced Trust Management Standards (ATMS) Sessions A and B

July 20-21, 2025 | Montréal, Québec

September 6-7, 2025 | St. John's, Newfoundland and Labrador

November 21-22, 2025 | San Diego, California

Designed for the needs of experienced trustees, ATMS will give you the tools you need to not only be successful in your role as a trustee, but also let you look toward the future and prepare your plan for the challenges ahead. For trustees who have either completed the FTMS program or passed the ATMS Qualifying Test, ATMS focuses on the application and analysis of the key knowledge areas—adding breadth and depth to what is learned in FTMS and deepening the pension and health and welfare applications.



## Master of Trust Management Standards (MTMS) Sessions A and B

July 24-25, 2025 | Montréal, Québec

November 21-22, 2025 | San Diego, California

For those who have completed both FTMS and ATMS, MTMS is for leaders in their organization who are ready to leverage their own unique leadership strengths and skills to optimize their contributions. Mock board meetings challenge trustees to apply new skills to solve real-life circumstances and scenarios.

You'll learn to engage and develop others—all with the aim of strengthening your plan or trust for the long-term benefit of your members.



## MTMS Advanced Leadership Summit

November 23, 2025 | San Diego, California

The MTMS Advanced Leadership Summit is a continuing education program for those who have earned an MTMS credential. MTMS graduates will have the opportunity to continue their learning and develop deeper into relevant topics critical to a fund's overall strategy.

# ÉVÉNEMENTS EN FRANÇAIS

fr.ifebp.ca

Nous nous engageons à offrir à notre communauté francophone des opportunités de développement professionnel personnalisées dans les domaines des pensions et des avantages sociaux. Rejoignez-nous lors de nos prochaines conférences, où des experts du secteur partageront leurs connaissances sur les dernières tendances et les meilleures pratiques. Ces événements constituent également une plateforme unique pour le réseautage, permettant aux participants d'entrer en contact avec leurs pairs et les professionnels du secteur. Pour ceux qui recherchent la flexibilité, des sessions de formation virtuelles, bientôt disponibles, leur permettront d'accéder facilement à un apprentissage approfondi.



## **Célébrons la 25<sup>e</sup> édition du Séminaire sur la gestion des caisses de retraite**

29 mai 2025 | Montréal, Québec

Un événement pas comme les autres à ne pas manquer ! Pour notre 25<sup>e</sup> édition, nous vous offrons une expérience unique, riche en opportunités et en moments mémorables. Joignez-vous à nous pour des sessions et des panels spécialement conçus pour vous donner les meilleures stratégies d'investissement du moment. Des noms reconnus au Québec en économie, en géopolitique, des leaders du secteur d'investissement et des spécialistes partageront leurs parcours, leurs échecs, et leurs réussites. C'est aussi l'occasion idéale pour agrandir votre réseau. Des centaines de professionnels comme vous, venus pour échanger et collaborer.

Ne manquez pas cette édition historique !



## **Conférence annuelle canadienne sur les avantages sociaux**

23 au 26 novembre 2025 | San Diego, Californie

Rejoignez-nous en personne à la 58<sup>e</sup> Conférence annuelle canadienne sur les avantages sociaux pour obtenir les plus récents outils, les idées et les stratégies pour prendre des décisions efficaces au nom des participants de votre régime. Écoutez les experts de l'industrie, réseautez avec des professionnels des avantages sociaux et partagez des stratégies sur la gestion des fonds que vous gérez dans ce monde en constante évolution. La Fondation Internationale s'engage à vous aider à relever les défis à venir, en fournissant une source d'information impartiale et objective sur les principaux problèmes auxquels vous êtes confrontés tout en soutenant vos régimes de retraite et d'avantages sociaux.

Visitez notre site web et suivez notre page LinkedIn pour obtenir des ressources à jour, des informations sur les événements et un espace pour échanger avec d'autres professionnels.

[fr.ifebp.ca](http://fr.ifebp.ca)



L'International Foundation of Employee Benefit Plans (IFEBP en français)

[www.linkedin.com/showcase/ifebp-en-francais](https://www.linkedin.com/showcase/ifebp-en-francais)

# CUSTOMIZED TRAINING FOR YOUR TEAM

[www.ifebp.org/onsite-education](http://www.ifebp.org/onsite-education)

The Foundation's flexible on-site or online training brings industry-leading employee benefits education to your workplace. As your partner in education, we work with you to meet your unique training goals. With more than 65 years as a leading employee benefits education provider, we can help you prioritize your objectives and provide a cost-effective solution to meet your unique needs. Whether it's in-person education or online learning, we offer both off-the-shelf and customized training solutions.



## IN PERSON

Bring the experts to you—your city, your workplace, your staff. Having a subject matter expert at your organization allows for a one-of-a-kind learning and team-building experience.



## E-LEARNING COURSES

Industry-leading online education provides comprehensive and interactive training for your staff. Choose from eight e-learning courses that can be housed on your internal LMS for easy tracking.



## WEBCASTS

Offering a series of webcasts is a cost-effective and convenient way to train staff wherever they are located. Interact directly with subject matter experts who can address your specific issues.

## Our Most Popular Options for On-Site Training Include:

**FTMS** | FOUNDATIONS OF TRUST MANAGEMENT STANDARDS®

**ATMS** | ADVANCED TRUST MANAGEMENT STANDARDS™

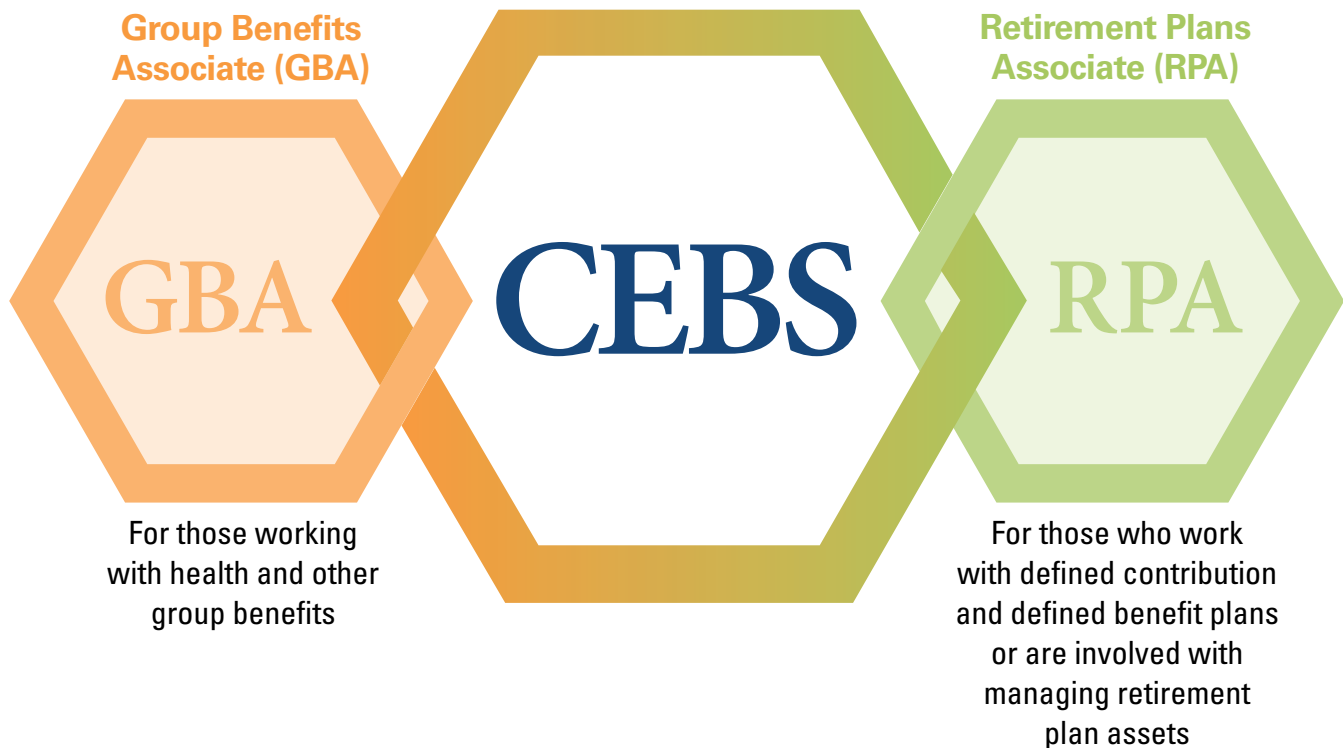
### We also provide customized training solutions in areas such as:

- Administration
- Apprenticeship management
- Communications
- Compensation
- Conflict resolution
- Diversity training
- Fiduciary responsibility
- Funding methods
- Governance
- Harassment training
- Investments
- Legal/compliance
- Management/leadership
- Retirement plans
- Service provider relations
- Strategic planning
- Supplemental group health plans.

# EXCEL IN YOUR ROLE BY EARNING A DESIGNATION

[www.cebs.org](http://www.cebs.org)

The **Certified Employee Benefit Specialist (CEBS)**, **Group Benefits Associate (GBA)** and **Retirement Plans Associate (RPA)** designations are highly regarded in the employee benefits industry. The curriculum is developed by Dalhousie University and is supported by research-based best practices. Whether you are looking to break into the industry, currently work in employee benefits or are an experienced benefits professional, these three designations provide the knowledge you need to tackle challenges you will face throughout your career.

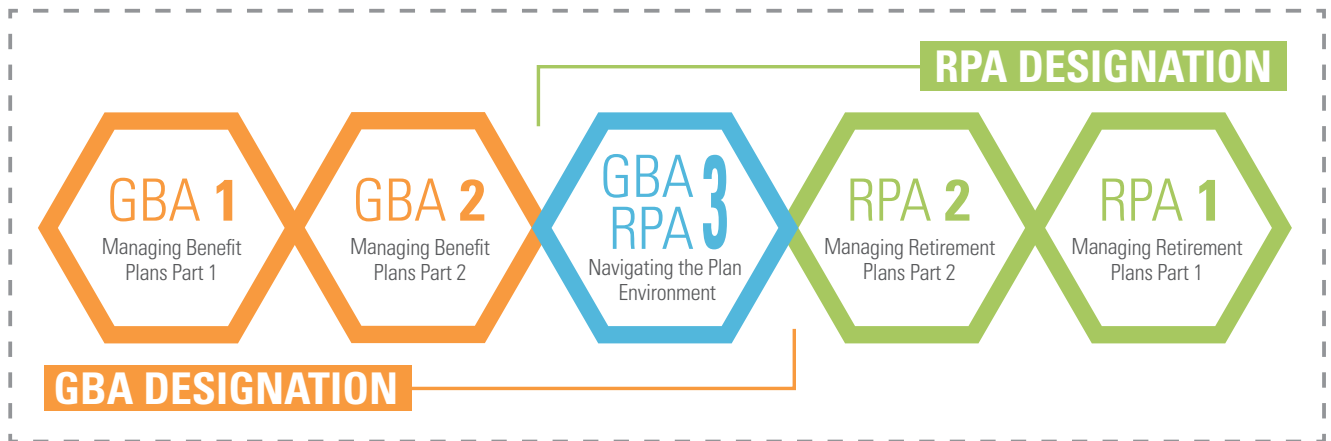


You'll learn from health and retirement curriculum—Streamlined core courses, laser-focused content, and less breadth and more depth mean now you can learn more in less time. To earn the CEBS designation, all five courses must be successfully completed. The GBA or RPA designation can be earned by completing three courses described on page 15.

A JOINT PROGRAM WITH



## CEBS Designation



### Group Benefits Associate (GBA)

The courses reflect up-to-date and relevant information—including the latest on health care—needed to effectively design, administer and communicate group benefits.

To earn the GBA designation, complete:

- GBA 1—Managing Benefits Programs Part 1
- GBA 2—Managing Benefits Programs Part 2
- GBA/RPA 3—Navigating the Plan Environment (*this course also counts for credit toward the RPA designation*).

### Retirement Plans Associate (RPA)

The courses reflect the most current and relevant information needed to effectively design and manage retirement plans.

To earn the RPA designation, complete:

- RPA 1—Managing Retirement Plans Part 1
- RPA 2—Managing Retirement Plans Part 2
- GBA/RPA 3—Navigating the Plan Environment (*this course also counts for credit toward the GBA designation*).

**SAVE 20% WITH A SUCCESS PACKAGE**

Save 20% when you purchase the Online Study Group With Instructor Support and corresponding exam.

[www.cebs.org](http://www.cebs.org)

# ONLINE LEARNING

[www.ifebp.org/online](http://www.ifebp.org/online)

Online education from the International Foundation is ideal for any learner. Whether you're just starting your career in pensions or group benefits and need to get quickly up to speed or you're a seasoned professional looking for in-depth, topic-driven content, online learning has you covered. Select the training that satisfies your unique needs—wherever your location.



## E-LEARNING COURSES

Learn on your schedule with self-paced online courses developed by industry experts.



## ONLINE CERTIFICATES

Complete a series of e-learning courses and gain a solid foundation of knowledge in a specific employee benefits discipline.



## VIRTUAL CONFERENCES

Attend the International Foundation conferences you love from the comfort of your home or office.



## ONLINE WORKSHOPS

Meet virtually with a subject matter expert and a small group of your peers for interactive training that you can immediately apply to your daily work.



## WEBCASTS

Keep your finger on the pulse of current issues facing the benefits industry by accessing both live and recorded webcasts that are free to International Foundation members!



# E-LEARNING COURSES AND ONLINE CERTIFICATES

[www.ifebp.org/onlinecertificates](http://www.ifebp.org/onlinecertificates)

## FUNDAMENTALS IN GROUP BENEFITS

Explore group benefits from a variety of perspectives to understand the process as a whole. Differentiate between the plan sponsor's and insurer's roles and responsibilities regarding the management of a group benefits plan, including plan design, funding, pricing, claims and premium administration, communication and the renewal process.



The Group Insurance Landscape



Group Benefits Funding and Pricing



Group Benefits Design and Administration



Life Cycle of a Group Benefits Plan

## FUNDAMENTALS IN RETIREMENT PLANS

Gain a solid understanding of retirement income needs and how retirement plans work to meet those needs. Learn about the various types of registered and nonregistered pension and savings plans, and take a deep dive into the intent and application of the Capital Accumulation Plan (CAP) Guidelines and the Canadian Association of Pension Supervisory Authorities (CAPSA) governance guidelines.



The Retirement Landscape



Retirement Plan Sponsor Responsibilities



Employer-Sponsored Retirement Plans



Life Cycle of a Group Retirement Plan

Take all four Fundamentals in Group Benefits or Fundamentals in Retirement Plans courses to earn a certificate—or take the courses individually. And remember, International Foundation members get a discount!

E-learning courses qualify for CEBS Compliance credit. Insurance professionals licensed in Alberta, British Columbia, Manitoba, Saskatchewan and Ontario can use Canadian e-learning courses to meet continuing education requirements.

# E-LEARNING COURSES AND ONLINE CERTIFICATES

[www.ifebp.org/onlinecertificates](http://www.ifebp.org/onlinecertificates)



## The Group Insurance Landscape

Learn what insurance is, why it is needed and the common benefits provided under group benefits plans. This course focuses on the relationships among the parties of a group insurance contract—the plan sponsor, insurer, plan advisors and plan members.



## Group Benefits Funding and Pricing

Discover the traditional funding methods used for group benefits plans, the factors that impact a plan sponsor's choice of funding method and the basic methods of pricing group insurance. It also includes an overview of factors that insurers consider in the renewal rating process.



## Group Benefits Design and Administration

Understand the plan sponsor's role in group benefits plan management and provides an overview of key requirements related to group benefits design, claims administration, premium administration, recordkeeping and communication.



## Life Cycle of a Group Benefits Plan\*

Understand the insurer's role and responsibilities at all stages of a group benefits plan life cycle—prospecting, quoting/selling, implementing, servicing, renewing and terminating. Ethical decision making is examined from the perspectives of all parties involved.



## The Retirement Landscape

Gain a basic understanding of what retirement income needs are and how retirement plans work to meet those needs. This course introduces the three pillars of the retirement system and outlines the key characteristics and the prevalence of registered and nonregistered plans.



## Retirement Plan Sponsor Responsibilities

A detailed explanation of the Capital Accumulation Plan (CAP) Guidelines and the Canadian Association of Pension Supervisory Authorities (CAPSA) governance guidelines. It reviews their significance for plan sponsors, plan members and insurers and highlights key differences between the two.



## Employer-Sponsored Retirement Plans

An overview of benefits arising from a registered pension plan on retirement, termination of employment or death. It examines various types of defined benefit registered pension plans and nonregistered savings plans and explains the pros and cons for employees and employers.



## Life Cycle of a Group Retirement Plan\*

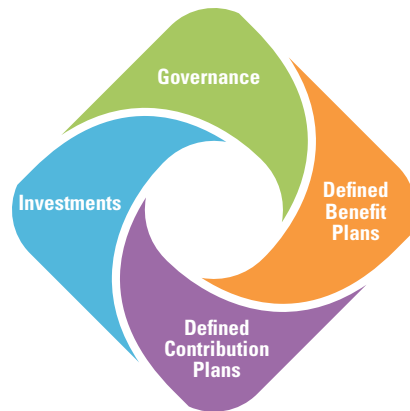
Understand the insurer's role and responsibilities at all stages of a capital accumulation plan (CAP) life cycle—prospecting, quoting/selling, implementing, servicing and terminating. Ethical decision making is examined from the perspectives of all parties involved.

*\*This course is available to all individuals. It is, however, designed to complete the curriculum for those who work for a member company of CLHIA and need to meet the Proficiency Standards.*

The International Foundation would like to acknowledge the Canadian Life and Health Insurance Association (CLHIA) and the member companies of CLHIA for sharing their vision and expertise in working with Dalhousie University as well as for their financial support to develop the courses.

# VIRTUAL CERTIFICATES

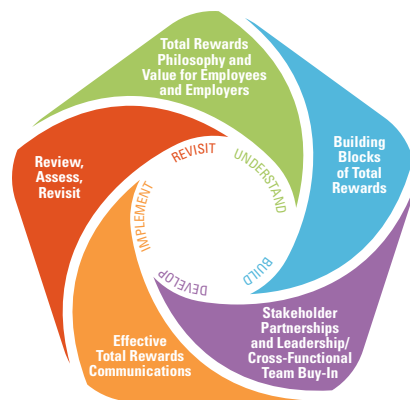
[www.ifebp.org/onlinecertificates](http://www.ifebp.org/onlinecertificates)



## Advanced Pensions Certificate

October 2025 | Virtual Course

Designed for those with experience in the retirement savings industry, this certificate provides advanced-level pension and investment content across four main modules: governance, defined benefit plans, defined contribution plans and investments.



## Total Rewards Certificate

June 2025 | Virtual Course

This certificate provides a holistic and employee-centric view of the total rewards landscape. Addressing both fundamentals and emerging trends, you'll learn how to design, develop and implement an effective and sustainable total rewards strategy.



## Certificate in Inclusive Benefits and Pension Modernization

March 12-13, 2025 | Virtual Course

This new certificate is designed to empower individuals and organizations with the knowledge, skills, tools and insights needed to modernize their employee benefits and pension programs. By aligning these programs with their commitment to diversity, equity, inclusion and belonging (DEIB), they can create a more diverse, equitable and supportive culture.

### Attendees will:

- Develop a DEIB-aligned philosophy for benefits and pensions
- Design equitable benefits and pension plans
- Create inclusive communication strategies for benefits and pensions
- Evaluate and Ensure Compliance with Legal and Equity Standards
- Analyze case studies of successful DEIB integration in benefits and pensions
- Identify and apply current and emerging trends in inclusive benefits and pensions.

# REACH OUR MEMBERS

[www.ifebp.org/exhibitsponsor](http://www.ifebp.org/exhibitsponsor)

Many of the programs listed throughout this catalogue offer opportunities for sponsors or exhibitors to connect with attendees. Join us to network with decision makers so you can nurture your business relationships in person; secure high-quality leads; and showcase your brand, products and services.



## EXHIBIT

Generate meaningful connections and drive business growth by exhibiting at one of the following conferences.

- Art & Science of Health Promotion Conference
- CONNECT Global Employee Benefits and Workforce Strategies Summit
- EVOLVE Benefits and Workforce Strategies Summit

## SPONSOR

Build relationships with key decision makers by sponsoring one of the following conferences.

- Annual Canadian Employee Benefits Conference
- Annual ISCEBS Employee Benefits Symposium
- Art & Science of Health Promotion Conference
- Benefit Communication and Technology Institute
- Canadian Health and Wellness Innovations Conference
- Canadian Investment Institute
- Canadian Legal and Legislative Update
- Canadian Public Sector Pensions and Benefits Conference
- CONNECT Global Employee Benefits and Workforce Strategies Summit
- EVOLVE Benefits and Workforce Strategies Summit
- Fraud Prevention Institute for Employee Benefit Plans
- Institute for Apprenticeship, Training and Education Programs
- Séminaire sur la gestion des caisses de retraite

## ADVERTISE

Promote your organization in our publications! Our niche audience consists of over 30,000 employer trustees, administrators and benefit plan professionals. Print and digital options are available.

- *Today's Headlines* is an e-newsletter delivered each day to over 3,400 Canadian Foundation members.
- *Plans & Trusts* magazine is distributed bimonthly to over 3,700 Canadian Foundation members.
- Jobs in Benefits is a virtual hub where the best candidates and the best organizations can connect, infusing new talent and innovation into organizations across the industry.
- The Service Provider Directory is an online resource for employee benefits, compensation and human resources–related products and services.

### EXHIBIT OPPORTUNITIES:

[jichiba@ifebp.org](mailto:jichiba@ifebp.org)

### SPONSORSHIP AND ADVERTISING OPPORTUNITIES:

[dianem@ifebp.org](mailto:dianem@ifebp.org)

# INTERNATIONAL FOUNDATION MEMBERSHIP

[www.ifebp.org/membership](http://www.ifebp.org/membership)

The International Foundation covers trending topics, breaking compliance updates and legislative updates. Our resources will help you:



## **Legislative and Regulatory Updates**

Find vetted, expertly curated updates on issues impacting the pensions and benefits landscape.

### ***Today's Headlines***

Stay ahead of benefit regulations with daily compliance alerts, benefits news stories, and industry legislative and regulatory updates.



## **Jobs in Benefits/Career Resource Centre**

Find your next great hire, develop your career as a benefits professional, learn the latest trends in benefits and get an idea of salaries in your field.

### **Community**

Chat directly with your peers, connect, share best practices, and learn with other members who share your interests and concerns.



## **InfoQuick**

Instantly access resources amongst over 100 frequently asked questions about industry topics, saving hours of searching time.

### **Sample Documents**

Enough starting from scratch—View sample policies, forms, RFPs, checklists and other documents first.

### **Personalized Research Service**

Save hours of time by letting one of our information specialists handle your complicated benefits questions.

### **Benchmarking Survey Reports**

Access difficult-to-find details and benchmarking tactics to address the challenging benefits environment. Recent reports cover GLP-1 drug coverage, apprenticeship program trends, mental health and substance use disorder benefits.



## **Webcasts**

Gain just-in-time information on developing benefit issues, delivered by experts, with unlimited live and on-demand webcasts.

### ***Plans & Trusts Magazine***

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month.

### **Toolkits**

Find expertly-curated resources on topics impacting you and your plans including DEI, mental health, financial education and retirement security, benefits communication and more.

# CONTINUING EDUCATION

[www.ifebp.org/ce](http://www.ifebp.org/ce)

International Foundation programs and courses are regularly approved to fulfill continuing education (CE) requirements for professional licenses, certifications and designations.

## Lawyers

For seminars and conferences, continuing professional development (CPD) can be earned in many provinces. The International Foundation seeks approval of seminars and conferences from province law societies based on requests for CE credit on program registration forms. Credit for self-study courses is subject to individual province regulations.

## Insurance Agents

The International Foundation seeks approval of seminars and conferences from province insurance departments based on requests for CE credit on program registration forms. It is important to register at least 30 days in advance of the program so that credit can be sought. Due to the approval process by the Chambre de la sécurité financière, insurance CE credit is not available in Québec.

## CEBS Compliance

To attain the status of CEBS Compliant, graduates need to report 30 hours of eligible activities during a two-year period. The chosen activity must cover one or more of the CEBS content domain topics, which can be found at [www.cebs.org/compliance](http://www.cebs.org/compliance). CEBS graduates of the U.S. and Canada, of any year, are eligible to participate to attain this additional level of recognition. Most education programs sponsored by the International Foundation or the International Society of Certified Employee Benefit Specialists (ISCEBS) qualify for CEBS Compliance credit, including:



- Attendance at an International Foundation in-person conference
- Attendance at the ISCEBS Symposium
- CEBS courses not taken to originally earn the CEBS designation
- International Foundation webcasts or e-learning courses
- Attendance at an ISCEBS local chapter educational program.

## Credit Hours

Credit hours and filing procedures vary by discipline and province. Please visit our website at [www.ifebp.org/ce](http://www.ifebp.org/ce) or contact the International Foundation Continuing Education Department for more information at (262) 786-6710, option 2, or [continuinged@ifebp.org](mailto:continuinged@ifebp.org).

**FOR MORE INFORMATION,** contact the International Foundation Continuing Education Department.

**Phone:** (262) 786-6710, option 2

**Email:** [continuinged@ifebp.org](mailto:continuinged@ifebp.org)

**Online:** [www.ifebp.org/ce](http://www.ifebp.org/ce)

# GET INVOLVED

[www.ifebp.org/getinvolved](http://www.ifebp.org/getinvolved)

The Foundation depends on collaborative efforts between our board and committee members as well as staff and member feedback to stay on the pulse of industry issues and needs. Over 180 trustees, administrators and benefits professionals serve within the Foundation's board and committee structure and contribute their expertise to develop educational content and other services.

## Here's How You Can Increase Your Personal Involvement:

### ENGAGE

#### **Connect With and Leverage Your Community**

Share best practices and find solutions on the Foundation Community. You can also connect with colleagues, fellow members and information on Foundation social networks. Nowhere else will you find people who understand your challenges quite like this community does!

### SHARE

#### **Speak, Present, Author**

Don't keep your knowledge to yourself! Help others in the trenches by sharing your ideas and thought leadership through authoring a magazine article or presenting a conference session or a webcast. You could also moderate a session or serve as a discussion leader.

### LEAD

#### **Serve on a Committee**

Take an active part in developing products and services and charting courses of action for the International Foundation by volunteering for a board or committee. Any member of the International Foundation can be nominated. Submit your information or nominate a colleague. We'd love to hear from you.

[www.ifebp.org/getinvolved](http://www.ifebp.org/getinvolved)





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### Mission Statement

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.