

2025

Membership Handbook

We Can't Wait to Help!

This guide outlines membership resources to help you stay compliant and create the best benefit offerings for your organization.

YOUR PENSIONS AND BENEFITS COMMUNITY



You Are Part of Something BIG

The Foundation serves over 31,000 members like you throughout Canada and the United States, including:

- Trustees and administrators from multi-employer trust funds
- Benefits, compensation and human resources leaders from the private sector
- Public employee plan managers, administrators and trustees
- Service providers, including lawyers, actuaries, accountants, and others who work with benefit and compensation plans.

The Foundation depends on collaborative efforts between Canadian and U.S. board and committee volunteers, staff and members to stay ahead of industry issues and needs.

Over 180 trustees, administrators and benefits professionals serve within the volunteer Foundation board and committee structure and contribute their expertise to develop educational program content and other services.

6,700

Organizations



31,000

Individual members



25 million

Individuals across Canada and the U.S. impacted by the reach of International Foundation members

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.

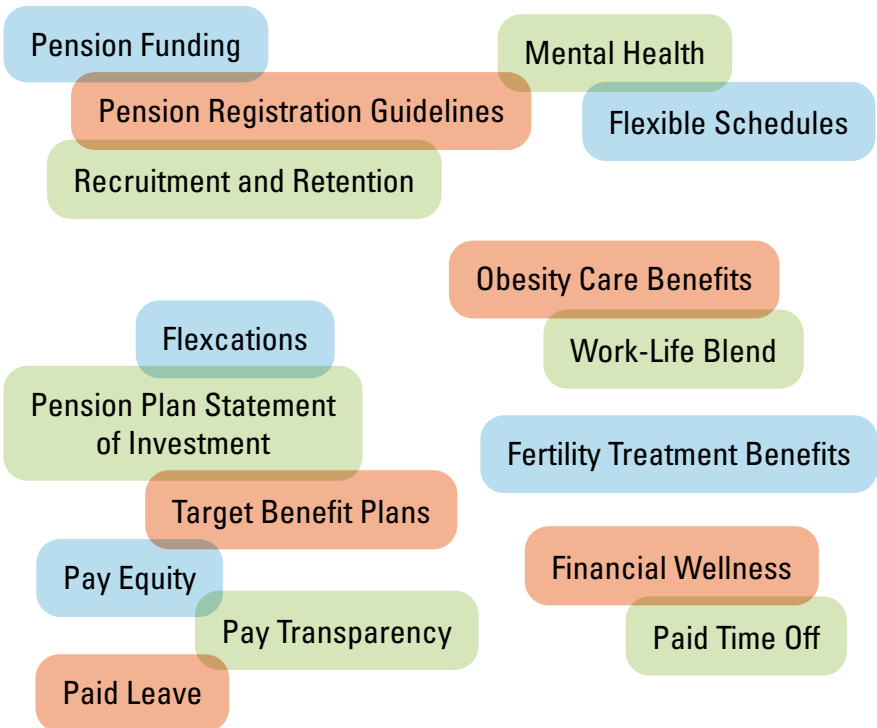
LET US HELP YOU...



Stay Compliant

Stay ahead with pensions and benefits news stories and industry updates with the members-only **TODAY'S HEADLINES** email. This email was recently redesigned to feature articles that are more closely aligned with your role and interests.

Be the first to know about updates on budget, benefits, employment, insurance, labour, health and pensions, and provincial/territorial legislation resources with the **CANADIAN LEGISLATIVE SCORECARD**. You'll also receive alerts covering these topics through *Today's Headlines*.



Save Time

Save time by heading to the **BENEFITS KNOWLEDGE CENTER**. There you will be able to:

1. Let one of our information specialists handle your complicated benefits questions by using the **PERSONALIZED RESEARCH SERVICE**.
2. Avoid starting from scratch by locating **SAMPLE DOCUMENTS** consisting of sample policies, forms, checklists and other documents.
3. Save hours of searching time by instantly accessing curated collections of articles and web pages in over 100 industry topic **INFOQUICKS**.

Questions our members have requested personalized research on lately:

1. Do you have information on best practices for a cybersecurity policy? I'm looking for a sample policy or articles.
2. I'm looking for information on a typical range of annual per employee spend on employee events for mid- to large-sized companies.
3. I want to ensure we are following Canadian law when it comes to any required leave for a death in the family.

Visit www.ifebp.org/benefitsknowledgecenter to learn more.



Make Connections

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 through **JOBS IN BENEFITS**. Visit www.ifebp.org/JobsInBenefits to explore more.

Talk directly with your peers and learn how they are taking action on similar issues, or keep an eye on the conversation to learn best practices through the **FOUNDATION COMMUNITY**.

Find out what other employers are doing and easily compare your benefit offerings through niche **BENCHMARKING DATA**. View recent reports and findings at www.ifebp.org/research.



Join the Foundation Community discussion group(s) vital to your role.

- Plan Sponsors (U.S.)
- Service Providers
- Global Benefits
- Canada

Sign Up

1. Visit www.ifebp.org/myprofile. Sign in.
2. In the Manage My Communications tab, click My Community.
3. Check the box for the group(s) you'd like to join.

Learn From the Experts

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month. Read the next **PLANS & TRUSTS** issue at www.ifebp.org/magazines, or wait until it arrives in your mailbox!



Gain just-in-time information on developing benefit issues, delivered by experts through unlimited live and on-demand **WEBCASTS**. Visit www.ifebp.org/webcasts for a full listing.

RECENT WEBCASTS INCLUDE:



2024 Mental Health Trends: Designing a Modern Strategy for Your Workforce



Financial Planning for a Healthy Retirement



Designing Tomorrow: Personalized Benefits. Let's Meet Employees Where They Live Worldwide!

www.ifebp.org/webcasts

Save Money

Receive **DISCOUNTS** on conferences, courses and online education. You'll notice a special member price on nearly every educational event offered.

MORE WAYS TO LEARN

READ ON

Word on Benefits® Blog: www.ifebp.org/blog

- Decumulation Challenges and Solutions for Plan Members: Three Takeaways
- The Four-Day Workweek—A Real Option for Employers or Hype?
- Could ChatGPT Be Used in Employee Benefits?
- Trauma in Organizations: Mental Health
- Supporting Women in the Workplace



RESOURCES BY TOPIC



Toolkits

www.ifebp.org/toolkits

Do your job better and faster with expertly curated resources on topics impacting you and your plans.

- ✓ **Cybersecurity**
- ✓ **Workplace Wellness**
- ✓ **Workplace Mental Health**
- ✓ **AI/ChatGPT**
- ✓ **Benefits Communication for Plan Sponsors**
- ✓ **Employee Benefits in Canada**
- ✓ **Financial Education**
- ✓ **Diversity, Equity and Inclusion Education**

Not finding what you're looking for?

Let our benefits information experts search for what you need.

Call: (833) 886-3749, option 5

Email: infocenter@ifebp.org



QUESTIONS AND ANSWERS



Q: How do I access my member benefits online?

A: Many member benefits are available online with exclusive member access to areas of our website on www.ifebp.org. If you forget your username and/or password, recover/change it by using the log-in page on the top right of the home page.

Q: If my organization purchased the individual membership for me and I leave the company, will I be able to take the membership with me?

A: When an organization pays for a membership, the organization is entitled to replace you if it wishes. Please call (833) 886-3749 to discuss your options for remaining a member.

Q: If my organization has an individual membership, can it be upgraded to an organizational membership at any time?

A: Absolutely. Contact us at (833) 886-3749 and any membership assistant will be happy to help you upgrade your membership.

Q: Now that I am a member of the International Foundation, am I automatically enrolled in the CEBS program or ISCEBS?

A: The Certified Employee Benefit Specialist® (CEBS®) program is a designation program that is offered by the International Foundation. Starting the CEBS program is a separate process; membership in the Foundation is not required. The International Society of Certified Employee Benefit Specialists (ISCEBS) is a different membership offered to CEBS, CMS, GBA and RPA graduates and also to current CEBS students.

Q: What are my responsibilities as the primary contact for an organizational membership?

A: As the primary contact, you will receive annually the dues renewal invoice for the next calendar year. Included with the dues renewal will be the membership roster. The roster is a listing that shows your organization and contact information, followed by names of the active individuals. Be sure to contact us with any updates to the roster throughout the year.

Q: Can a nonmember serve as a primary contact for an organizational membership?

A: Yes. It is not required that the primary contact be an active member. You can designate any employee from your organization to handle your membership.

Q: Can two multi-employer trust fund boards be represented on one membership?

A: Separate memberships are to be taken out for funds that do not have identical boards. Members on a trust fund membership must work solely for the fund.

Q: If the membership is a multi-employer or public employee trust fund and is administered by a third-party administrator, can the representative from that organization be listed as an active member on the fund's membership? In addition, can the fund's lawyer be listed as an active member on the fund's membership?

A: For trust fund memberships, the administrator or lawyer must work solely for the fund. The third-party administrator or lawyer will need to take out a separate membership for their own organization.

Q: If we have a trust fund membership, can we add to our membership a trustee from another fund who is not an active member?

A: Often funds do not have identical boards of trustees for their various plans. If this is the case, a separate membership would need to be taken out for each fund.

Q: Can I wait until dues are reduced each year instead of renewing at the full dues rate?

A: Reduced rates apply to new memberships only. If your membership expired more than 12 months ago, you are now eligible to rejoin at promotional rates as a new member.

Q: Is there a preferred way to get a roster update or other written requests to the International Foundation?

A: There are a few options to update an organization's roster. The primary contact should include the organization membership number on all correspondence.

1. Use the My Profile area of our website at www.ifebp.org/myprofile. The primary contact should use their individual ID, not the group ID, to access the roster.
 2. Once logged in, go to Manage My Organization/Fund and make roster changes by going to the Members tab.
3. Mail the roster to:
International Foundation of Employee Benefit Plans
Attn: Membership Dept.
P.O. Box 2506
Postal Station A
Toronto, ON M5W2K6 Canada

If a roster is not available:

Email a request to membership@ifebp.org.

Q: When I replace an individual on the roster with a new person, does the new person adopt the removed person's individual membership number?

A: No. The new person will be assigned a new number and will keep this number when moving to another company and becoming a member again in the future. An individual's membership number "travels" with the individual.

Q: Are we able to add to our membership a colleague who works with our company or fund but is not employed by us?

A: A colleague who works with your company or fund who is not employed by your company or fund will need to take out a separate membership for their own organization.

Customize Your Membership Experience

Review Your Profile Today

Make sure you are signed up to receive only the International Foundation communications you want by reviewing and updating your profile. Information provided is kept strictly confidential.

Visit www.ifebp.org/myprofile to get started!

