

# 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 BENEFITS COMMUNITY



# You Are Part of Something BIG

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

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

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

Over 180 benefit plans sponsors and benefit plan advisors 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 the U.S. and Canada 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.

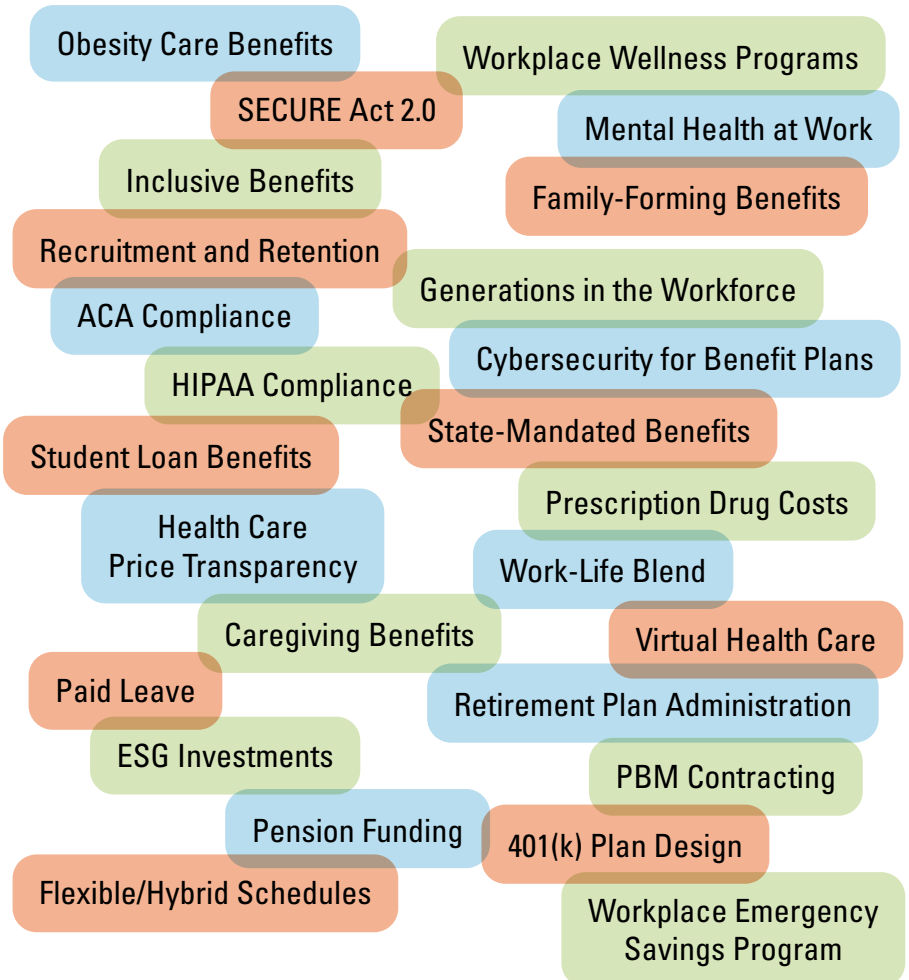
# LET US HELP YOU...



# Stay Compliant

Stay ahead of benefit regulations with daily compliance alerts, benefits news stories, and industry legislative and regulatory updates with the members-only **TODAY'S HEADLINES** email. This email was recently redesigned to display articles that are more closely aligned with your role and interests.

Be the first to know about news out of Washington impacting the employee benefits landscape through **LEGISLATIVE AND REGULATORY UPDATES**. To find these updates, go to [ifebp.org/news](http://ifebp.org/news) or receive new postings in *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. Can municipal plans also be ERISA plans? Can accepted benefit plans that are also municipal plans be ERISA plans?
2. Is there any benchmarking information about tuition reimbursement programs? Particularly maximums for undergraduate versus graduate programs and retention incentives and/or payback.
3. One of our team members wants to add her husband to her benefits as he has been released from incarceration. Is this a qualifying event?

Visit [www.ifebp.org/benefitsknowledgecenter](http://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](http://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 **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](http://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](http://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 **BENEFITS MAGAZINE** issue at [www.ifebp.org/magazines](http://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](http://www.ifebp.org/webcasts) for a full listing.

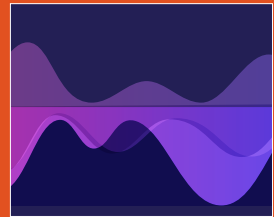
## RECENT WEBCASTS INCLUDE:



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



DOL Developments and Updates



Are Lifestyle Spending Accounts a Fad or Must-Have?

[www.ifebp.org/webcasts](http://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.

Get quick, curated information on hot topics impacting our industry with member-exclusive **TOOLKITS**. Dig deeper into topics like DEI, benefits communication, mental health and more.

## MORE WAYS TO LEARN

### READ ON

Word on Benefits® Blog:  
[www.ifebp.org/blog](http://www.ifebp.org/blog)

- Top Reasons for 401(k) Loans
- Employee Retirement Security Awareness
- Organization Adding More Fertility and Adoption Support
- Employers Project 8% Rise in Health Care Costs for 2025
- Inclusive Family-Forming Benefits: Definition of Infertility

### LISTEN UP

*Talking Benefits* Podcast:  
[www.ifebp.org/podcast](http://www.ifebp.org/podcast)

- GLP-1 Coverage Update
- Spotlight on Women's Health
- Financial Education Trends
- Loneliness in the Workplace

# RESOURCES BY TOPIC



# 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**
- ✓ **SECURE Act 2.0**
- ✓ **Trustee Resource Center**
- ✓ **Financial Education**
- ✓ **Diversity, Equity and Inclusion Education**

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

## Not finding what you're looking for?

*Let our benefits information experts search for what you need.*

**Call:** (888) 334-3327, option 5

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

# QUESTIONS & 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](http://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 (888) 334-3327, option 1, 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 (888) 334-3327, option 1, 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 multiemployer 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 multiemployer 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 attorney be listed as an active member on the fund's membership?

**A:** For trust fund memberships, the administrator or attorney must work solely for the fund. The third-party administrator or attorney 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](http://www.ifebp.org/myprofile). The primary contact should use their individual ID, not the group ID, to access the roster.

Once logged in, go to "Manage My Organization/Fund" and make roster changes by going to the "Members" tab.

2. Mail the roster to:  
International Foundation of Employee Benefit Plans  
Attn: Membership Dept.  
18700 West Bluemound Road  
Brookfield, WI 53045

**If a roster is not available:**

Email a request to [membership@ifebp.org](mailto: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 the colleague's 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](http://www.ifebp.org/myprofile) to get started!

**International Foundation**  
OF EMPLOYEE BENEFIT PLANS

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Brookfield, WI 53045-2936  
[www.ifebp.org](http://www.ifebp.org)

Nonprofit Org.  
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INTERNATIONAL FOUNDATION  
OF EMPLOYEE BENEFIT PLANS



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