

Employee Benefit Education

For Trustees, Administrators, Plan Sponsors,
Benefits Professionals and Advisors

2012

THE
ONE SOURCE

YOU NEED FOR EDUCATION
ON WHAT MATTERS MOST NOW

.....
CONFERENCES
.....

CERTIFICATE
PROGRAMS
.....

ONLINE
LEARNING
.....

PUBLICATIONS
.....

CEBS
DESIGNATION

Education that works for you, so you can make decisions that work for those you serve.

You can't make a positive impact on the lives of the plan participants you serve if you don't come to the table with practical solutions. Get ready to learn. Put it into action. Make a difference.

The International Foundation delivers education worth fitting into your schedule

- 1. Quality programming**—The Foundation has built a solid reputation for providing superior education for over 50 years. We're known in the benefits community as the source for relevant, in-depth information that delivers every time.
- 2. Expert instruction**—Our programs are developed and delivered by industry leaders. Learn from professionals who work in the field and relate to the challenges you face.
- 3. Timely information**—At the International Foundation, we live and breathe employee benefits. We have the resources to pull together and distribute the information to you without missing a beat.
- 4. Sound solutions**—Education is meaningless if you can't put it into action. Our programs are presented by practitioners who have the ability to share information in a relatable manner and to guide you through the practicalities of different strategies.
- 5. Unbiased facts**—You want education, not a sales pitch. Our programs deliver multiple perspectives on each issue discussed, allowing you to make sound decisions based on what you've learned.

In the current employee benefits climate, education can't wait for an opening on your calendar. Today's leaders are those who take time for education and, of equal importance, know where to turn to for reliable information.

This catalog outlines the variety of educational resources we offer. Delivered in a variety of locations and through multiple channels, you can find options that fit your needs.

Join the International Foundation

Members of the International Foundation receive substantial discounts on most program registrations. Not a member? Consider the benefits of joining. In addition to registration discounts, you'll gain access to a variety of valuable resources and services—all included with your membership. For more information on membership, see pages 54-55 or visit www.ifebp.org/memberkit.

International Foundation Mission

The International Foundation of Employee Benefit Plans is a nonprofit organization, dedicated to being a leading objective and independent global source of employee benefits, compensation and financial literacy education and information.



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2012 Program Schedule

	Date	Program	Page
Winter	January 23-25	Trustees Institute for Jointly Managed Training and Education Funds Las Vegas, Nevada www.ifebp.org/trusteesinstitute	9
	February 13-15	Trustees and Administrators Institutes Lake Buena Vista (Orlando), Florida www.ifebp.org/trusteesadministrators	10
	March 5-10	Certificate Series San Diego, California www.ifebp.org/certificate-series	26
	March 12-16	Certificate in Global Benefits Management Boston, Massachusetts www.ifebp.org/global	25
	March 19-21	Health Care Management Conference Savannah, Georgia www.ifebp.org/healthcare	11
Spring	April 23-25	Investments Institute White Sulphur Springs, West Virginia www.ifebp.org/investments	12
	May 7-8	Washington Legislative Update Washington, D.C. www.ifebp.org/washington	13
	May 21-24	Portfolio Concepts and Management Philadelphia, Pennsylvania www.ifebp.org/wharton	21
Summer	June 4-8	Essentials of Multiemployer Trust Fund Administration Brookfield, Wisconsin www.ifebp.org/essentialsme	14
	June 11-13	Trustees and Administrators Institutes San Francisco, California www.ifebp.org/trusteesadministrators	10
	June 11-13	Benefit Plan Professionals Institute for Accountants San Francisco, California www.ifebp.org/professionals	15
	June 18	Public Employee Benefits Update Boston, Massachusetts www.ifebp.org/peupdate	16
	June 19-20	Certificate of Achievement in Public Plan Policy (CAPPPTM)—Pensions and Health Part I Boston, Massachusetts www.ifebp.org/capppp	28
	June 21-22	Certificate of Achievement in Public Plan Policy (CAPPPTM)—Pensions and Health Part II Boston, Massachusetts www.ifebp.org/capppp	28

	Date	Program	Page
	June 25-26	Benefit Communication and Technology Institute Milwaukee, Wisconsin www.ifebp.org/benefitcommunication	17
	June 25-29	Certificate in Global Benefits Management Chicago, Illinois www.ifebp.org/global	25
	July 16-18	Hedge Funds, Real Estate and Other Alternative Investments San Francisco, California www.ifebp.org/wharton	22
	July 19-26	Certificate Series Brookfield, Wisconsin www.ifebp.org/certificate-series	26
	August 5-8	31st Annual ISCEBS Employee Benefits Symposium San Francisco, California www.ifebp.org/symposium	8
	September 10-11	Collection Procedures Institute Monterey, California www.ifebp.org/collections	18
Fall	October 8-10	Certificate in Canadian Benefit Plans Toronto, Ontario www.ifebp.org/canadacert	30
	October 15-20	Certificate Series Washington, D.C. www.ifebp.org/certificate-series	26
	November 10-11	Certificate of Achievement in Public Plan Policy (CAPPPTM)—Pensions and Health Part II San Diego, California www.ifebp.org/capppp	28
	November 10-11	Administrators Masters Program® (AMP®) San Diego, California www.ifebp.org/amp	31
	November 10-11	Trustees Masters Program® (TMP®) San Diego, California www.ifebp.org/tmp	32
	November 11	TMP® Advanced Leadership Summit San Diego, California www.ifebp.org/tmpsummit	33
	November 11-14	58th Annual Employee Benefits Conference San Diego, California www.ifebp.org/usannual	6

Where You Learn Matters— Choose Wisely

Selecting a trustworthy source for education is more important than ever. You don't have the time or budget to waste on a program that doesn't meet your expectations.

The International Foundation of Employee Benefit Plans is a nonprofit organization known as an objective and independent leader in employee benefits education. For more than 50 years, benefits professionals have relied on the Foundation for consistent quality in programming.

Our programs deliver

Relevance—Information that fits is more meaningful. We take the work out of applying what you learn to your situation by presenting information that is relevant to your particular role. Our programs are developed by active industry professionals who bring real-world insight to each program you attend.

Community—Learn alongside colleagues with a sense of common purpose. Make connections that last. Gather ideas that work. With over 34,000 active members and nearly 10,000 individuals attending face-to-face programs each year, the International Foundation is your networking connection.

Innovation—Bring your problems, leave with solutions. Our programs will present new strategies for facing enduring challenges, actionable solutions to today's crises and ideas to help you thrive in whatever environment you face in the future.



The International Foundation Difference

Make the choice to be educated. When you do, make sure you choose the best source for unbiased, impartial information. The International Foundation provides you with the best and most objective information. We are nonlobbying and nonpartisan; and, unlike other organizations, our conference sessions are free of vendor influence.

The International Foundation presents education you can feel good about, knowing your objective to learn was placed above all else. All of the facts. None of the fluff.

Sector Key

Each program in this catalog displays one or more icons, indicating the appropriate audience(s). For specific roles within each area, please review the "Who Should Attend" section of each program.

ME Multiemployer

Programs meet the needs of those working with multiemployer trust funds, including labor trustees, management trustees, administrators and professional advisors who serve multiemployer funds.

PE Public Employee

Programs address issues affecting public plans and will benefit public trustees (elected and appointed), governmental financial officers and staff, administrators and support staff, school district members and executives, union and employer representatives, and municipal and county officials.

CORP Corporate/Single Employer

Programs are intended for those who work with, administer or manage benefits, compensation or human resources for a single employer or corporate plan sponsor.

Foundation Initiatives

The International Foundation is committed to hosting an open and objective dialogue on issues relevant to retirement security as well as helping members understand and implement value-based health care (VBHC) strategies in their plans. The goals of these initiatives are to facilitate learning, education and discussion of these issues and innovative ideas and approaches on issues impacting retirement security and value-based health care. For more information on these initiatives, turn to page 34 of this catalog.

Throughout this catalog, you will see a symbol that signifies a retirement security component.

Programs and products that address a VBHC component are marked with this symbol.



Face-to-Face Conferences

Face-to-face programs present a multidimensional learning experience. Meet with others who share your interests and goals as you interact with leading experts in the field. Exchange ideas, explore alternatives, and build camaraderie with peers who share your passion. Nothing fosters relationships like face-to-face interaction. You'll walk away seeing things from a fresh perspective, thinking differently and ready to put your new knowledge into action.

International Foundation Member

Todd G. Helfrich
Managing Director
Eastern Contractors Association Inc

Conferences

November 11-14, 2012
San Diego Convention Center
San Diego, California

58th Annual Employee Benefits Conference

www.ifebp.org/usannual

Exhibits
and Sponsorships
Available



ME

PE

Topics

Administration, Health Care,
Investments, Retirement,
Fiduciary Responsibility,
Pension, Health and Welfare,
Technology, Communication,
Training and Education



Meeting #01-1201

Fees:

\$1,235 members
(open to members only)
Registration fee through 9/30/12

Hotel:

Visit www.ifebp.org/achotels.

Room Rate:

Various rates

Registration Priority Code:

2CATUS

This conference brings together not only experts in their field, but trustees from plans around the country in various trades and industries. It fosters “trustee-directed” learning, provides a forum for sharing experiences and enriches learning through networking. Offering one of the best values for your educational dollar, the conference covers ALL aspects important to trustees of employee benefit funds. Supplementing the main agenda, additional specialized sessions are offered for public sector plans and training and education funds, allowing you to pursue your area of interest and, in the process, helping you fulfill your fiduciary obligation.

Who Should Attend

- Taft-Hartley fund trustees, administrators, business managers and association leaders
- Public sector plan trustees and executive directors
- Fund administrators and managers
- Third-party administrators (TPAs)
- Benefit consultants
- Attorneys
- Accountants
- Actuaries
- Investment managers and consultants
- Coalition leadership
- Others who are involved in the overall management and administration of benefit trust funds

Key Takeaways

- The most timely and up-to-date information available
- A great value—over 100 classes, workshops, roundtable discussions and lectures
- Practical information that you can take home and use immediately
- Access to a vast exhibit hall and the resources and information it offers
- Specialized learning tracks for experienced and newer trustees
- Unique sessions for public sector plans and training and education funds

Accompanying Educational Events

- Trustees Masters Program®
- Administrators Masters Program®
- TMP® Advanced Leadership Summit (for TMP® Grads)
- Numerous Preconference Sessions
- CAPP™—Pensions and Health Part II (for public sector trustees and plan representatives)

Conferences

“It is very helpful in getting a pulse for what our clients are concerned with/interested in.”

Stephanie Patrick, Consulting Actuary
Horizon Actuarial Services LLC

“It is critical to understand your responsibility as a trustee and to share and learn from others who are in the same situations during these difficult economic times.”

Joey Merrick, Labor Trustee
Alaska Laborers Local 341

“This is the highest quality program available to H&W Plan educational materials.”

J. N. Musto, Trustee
Hawaii Employer Union Health Benefit Trust
Fund EUTF State of HI

“It is the only organization focused on the needs of Taft-Hartley trusts and trustees.”

John Littel, Labor Trustee
Carpenters Employers Apprenticeship &
Training Trust Fund

“Best unbiased source that doesn’t try to sell me something for attending the conference”

Frank Mellon, Management Trustee
East Bay Municipal Utility District

“Due to the issues we are experiencing and the amount of information available at the conferences, there was no question as to whether I would attend.”

Christopher J. Freeman, Management Trustee
MCA Detroit

“I was told that the program is absolutely the best and I was not disappointed.”

Joseph A. Colangelo, Trustee
SEIU Local 246

“The best place to learn and for educational programs”

Mario A. Vega, Labor Trustee
Local 170 Group Insurance Benefit

“It’s the best way to stay current and informed as a fiduciary.”

Susan Midori-Jones, Trustee
CA Teachers Association Employers Retirement Trust

“One of the only places that labor trustees can receive quality education on H&W-pension funds”

Terry Kramer, Labor Trustee
UFCW Local 1546



Conferences

August 5-8, 2012

Hilton San Francisco Union Square
San Francisco, California



CORP

Topics

Communication, Compensation, Fiduciary Responsibility, Fraud, Global, Health Care, Insurance, Investments, Legal/Legislative Update, Pension, Retirement, Strategic Human Resources



Meeting #12SYMP

Fees:

\$975 members

\$1,120 nonmembers

Rate guaranteed through 12/31/11

This meeting includes continental breakfasts, lunches and beverage breaks.

Hotel:

Hilton San Francisco Union Square

Room Rate:

\$239 single/double

Registration Priority Code:

2CATUS

31st Annual ISCEBS Employee Benefits Symposium

www.ifebp.org/symposium

Sponsorships
Available

For over 30 years, the Symposium has been the must-attend event for thousands of corporate benefits professionals. Designed with a variety of U.S., Canadian and globally oriented sessions, the Symposium is an unparalleled opportunity to learn from and alongside hundreds of industry colleagues, experts and leaders. Solution-oriented workshops, discussions, case studies and strategic sessions offering practical, timely takeaways are designed with your professional needs in mind. The Symposium features specialized tracks in health, retirement, strategic benefits and human resources, and Canadian issues. Each session delivers valuable and practical ideas and solutions that you can immediately take back to the office.

Who Should Attend

Corporate and professional members working for plan sponsors, CEBS, GBA, RPA, CMS designees and CEBS students who have passed at least one exam are eligible to attend.



The Employee Benefits Symposium will be submitted to the Human Resource Certification Institute (HRCI) for continuing education (CE) approval. CE credit will be offered to professionals who are PHR®, SPHR® and GPHR® certified. For HRCI inquiries, please contact the Society's Continuing Education Department at (262) 786-6710, option 2; or e-mail continuinged@ifebp.org.

Key Takeaways

- Customized education. Sessions are grouped into health, retirement, strategic benefits and human resources, and Canadian tracks.
- Continuing education credit for insurance producers in several states and recertification credit for those holding the PHR, SPHR, and GPHR designations
- Numerous opportunities to interact with an experienced and diverse group of industry practitioners
- Special guest rates for a colleague, client or boss who wouldn't otherwise be eligible to attend

Trustees Institute for Jointly Managed Training and Education Funds

www.ifebp.org/trusteesinstitute

As the economic recovery progresses, trustees and Joint Apprenticeship and Training Committee (JATC) members of training funds face the challenge of making sure their industries' workforces are positioned to compete for the highly skilled jobs of a new global economy. This means that training programs must have the tools and resources needed to prepare their workers for the next generation of jobs. The Trustees Institute for Jointly Managed Training and Education Funds addresses those current challenges, and will assist trustees and JATC members in reevaluating their training programs in light of the new economic reality and government focus on plan operations.

Who Should Attend

The institute is devoted specifically to the needs and interests of those who manage and administer training and education funds in both the United States and Canada: trustees, JATC members, union/ employer association representatives, administrative staff, training coordinators and others who provide services to training and education funds.

Key Takeaways

- Network with peers who face similar challenges.
- Learn best practices in the management of your fund.
- Understand legal and regulatory requirements.
- Ideas and opportunities
- Valuable written resource materials

January 23-25, 2012

Paris Las Vegas
Las Vegas, Nevada



Basic Intermediate Advanced

ME

Topics

Administration, Health Care, Investments, Retirement, Training and Education

Meeting #32-1232

Fees:

\$1,190 members
\$1,415 nonmembers
Registration fee through 12/12/11

This meeting includes continental breakfasts, lunches and beverage breaks.

Hotel:

Paris Las Vegas

Room Rate:

\$139 single/double

Registration Priority Code:

2CATUS

“When attending conferences I always walk away with some useful information.”

Richard Yost

Labor Trustee

Laborers District Council of Eastern Pennsylvania

Conferences

February 13-15, 2012

Disney's Contemporary Resort
Lake Buena Vista (Orlando), Florida



June 11-13, 2012

San Francisco Hilton Union Square
San Francisco, California



ME

Topics

Administration, Fraud, Health Care,
Investments, Pension, Retirement



Lake Buena Vista (Orlando), Florida

Meeting #02-1202

Fees:

\$1,080 members

\$1,305 nonmembers

Registration fee through 1/2/12

This meeting includes continental
breakfast and beverage breaks.

Hotel: Disney's Contemporary Resort

Room Rate: \$249 single/double

Registration Priority Code:
2CATUS

San Francisco

Meeting #09-1209

Fees:

\$1,080 members

\$1,305 nonmembers

Registration fee through 4/30/12

This meeting includes continental
breakfast, lunch, welcome reception,
exhibit hall and networking reception.

Hotel:

San Francisco Hilton Union Square

Room Rate: \$237 single/double

Registration Priority Code:
2CATUS

Trustees and Administrators Institutes

www.ifebp.org/trusteesadministrators

Exhibits
and Sponsorships
Available

New Trustees Institute



Designed for trustees who have served for less than two years, or who have not previously attended an International Foundation educational program. The curriculum will focus on your role as a trustee, understanding of the key issues in managing your pension and health and welfare funds, and the complexities of trust fund management and administration.

Advanced Trustees Institute



Designed for the experienced trustee—those who have attended the New Trustees Institute and have served as trustees for more than three years. Sessions will focus on the current and emerging issues in pension and health and welfare plans.

Administrators Institute



Designed for salaried and contract administrators of all experience levels. The sessions will focus on the key administrative areas you deal with each day, from legal and regulatory compliance to maximizing efficient operations and staff productivity.

Key Takeaways

- Learn from industry experts about the current state of affairs and latest reform initiatives—Be prepared for what lies ahead.
- Network with peers who face similar challenges—Learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to implement.
- 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.

Accompanying Educational Event to the June program

Benefit Plan Professionals Institute
for Accountants

Health Care Management Conference

www.ifebp.org/healthcare

Sponsorships Available

Health care reform is reshaping our environment. This conference will provide you with the opportunity to focus on and plan for what that means to your fund. It will give you structure for further discussion within your individual boards. In addition, get up-to-date information about newly released regulations and the experiences of other plans.

Who Should Attend

- Trustees of multiemployer trust funds of any size
- Third-party and salaried administrators
- Fiduciaries and trustees from governmental plans
- Members of bargaining committees (management and labor)
- Key decision makers and support staff from the public sector

Key Takeaways

- Receive the most up-to-date information and clarification on health care legislation and regulatory compliance available.
- Understand how others are addressing similar compliance issues and managing health plans.
- Get tips on effective cost-saving techniques that work for both the employer and the participant.

March 19-21, 2012

Hyatt Regency Savannah
Savannah, Georgia



Basic Intermediate Advanced

ME PE

Topics

Data Analysis, Wellness,
Quality and Health Care Delivery



Rollout of project findings of the Foundation's expansive initiative on value-based health care (VBHC). Case studies and a practical tool kit for integrating VBHC strategies into health and welfare plans.

Meeting #31-1231

Fees:

\$1,190 members
\$1,415 nonmembers
Registration fee through 2/6/12

This meeting includes continental breakfasts, lunches, beverage breaks and a reception.

Hotel:

Hyatt Regency Savannah

Room Rate:

\$188 single/double

Registration Priority Code:

2CATUS

“Every time I attend an International Foundation meeting, I always come away with at least one idea I can put to work within a week or two after arriving back at my office. The experts who speak at the Foundation programs have always been more than willing to provide the expertise on a one-on-one basis any time I have asked.”

Richard C. Northrup
Executive Vice President
Michigan Chapter SMACNA

Conferences

April 23-25, 2012

The Greenbrier Resort
White Sulphur Springs,
West Virginia



Topics
Investments



Meeting #13-1213

Fees:

\$1,080 members

\$1,305 nonmembers

Registration fee through 3/12/12

This meeting includes continental
breakfasts, a reception and
beverage breaks.

Hotel:

The Greenbrier Resort

Room Rate:

\$199 single/double

Registration Priority Code:

2CATUS

Investments Institute

www.ifebp.org/investments

The world of investing has become far more complex in the last decade. This means trustees have a greater need than ever to stay current and up to date with the trends and strategies within the world of investments. What have the markets of the past taught? How have funds responded? Do past investment strategies still make sense? These questions and more will be addressed at this year's institute.

Who Should Attend

- Trustees from both multiemployer and governmental plans
- Fiduciaries of voluntary employees' beneficiary associations
- Key decision makers
- Those involved in setting or assisting in developing investment policy

Key Takeaways

- Learn the latest strategies regarding investment approaches.
- Gain an outlook on the economy as well as the capital markets for discussion with your board.
- Hear what other funds are doing and why.
- Get the most up-to-date information on legislation and regulations impacting employee benefit plan investments.

“Conferences are a great way to get the most current information on timely topics.”

Linda M. Whelton

Benefits Department Manager
NY State Nurses Association Benefits Fund

Washington Legislative Update

www.ifebp.org/washington

As we head into the next presidential election, the future of employer sponsored employee benefit plans is uncertain. A divided congress and intense financial pressures on federal, state and local budgets, has focused on benefits issues. Plan sponsors are watching closely for guidance on implementing the health care reform legislation. Pension funding continues to be a challenge. Plan participants are feeling the pressure as well. Join us for the 2012 Washington Legislative Update to get the direction you need. Hear from industry experts and Washington insiders what the future direction is likely to be and understand how the latest legal and regulatory initiatives will impact your plans, your profession and your participants. Walk away informed, engaged and prepared for the future.

Who Should Attend

This program is designed for employee benefits representatives who serve multiemployer, single employer and public sector benefit plans.

Key Takeaways

- Understand the issues, trends and future direction of the industry from expert speakers.
- Prepare for the future and how your plans will be impacted by recently enacted and proposed legislation and regulations.
- Network with those who face similar challenges for productive dialogue, creative ideas and workable solutions.
- Take advantage of your time in Washington and have your voice heard. Schedule time to meet with your congressional representatives to discuss the issues that impact your plans.
- Access a direct pipeline to what's happening on the Hill.

“The Washington Legislative conference has always enabled me to keep my plan ahead of the curve. I highly value this conference over all others.”

Laurie Van Dusen
Director of Benefits
Daytona State College

May 7-8, 2012

The Capital Hilton
Washington, D.C.



Basic Intermediate Advanced

ME PE CORP

Topics

Administration, Benefits, Health Care, Investments, Legal/Legislative Update, Pension, Retirement



Meeting #12-1212

Fees:

\$970 members
\$1,120 nonmembers
Registration fee through 3/26/12

This meeting includes breakfasts, lunches and beverage breaks.

Hotel:

The Capital Hilton

Room Rate:

\$309 single/double

Registration Priority Code:

2CATUS

Conferences

June 4-8, 2012

International Foundation
Training Center
Brookfield, Wisconsin

Essentials of Multiemployer Trust Fund Administration

www.ifebp.org/essentialsme

This program provides a solid grounding in all aspects of multiemployer trust fund administration. In this evolving environment, a fundamental knowledge base is critical for both seasoned and new administrators. Keep up to date on the latest legislation and regulatory requirements, as well as develop a supportive peer network to learn how others face similar problems. Class size is limited to support a highly interactive and educational environment.



Topics

Administration, Communication,
Financial Planning, Health Care,
Human Resource Management,
Investments, Legal/Legislative
Update, Pension, Retirement

Meeting #14-1214

Fees:

\$2,020 members
\$2,395 nonmembers
Registration fee through 4/23/12
This meeting includes continental
breakfasts, lunches and
beverage breaks.

Hotel:

Do not include hotel deposit.
Please book directly at the
Doubletree Hotel Milwaukee/
Brookfield. (262) 792-1212

Registration Priority Code:
2CATUS

Who Should Attend

- Recently promoted supervisors and administrators
- Lead administrative staff and managers
- Account representatives
- Staff new to benefits
- New staff providing professional support services to multiemployer clients

Key Takeaways

- Keep up to date on all aspects of multiemployer fund administration.
- Form a network of your peers for future contact and questions.
- Bring back new information and ideas for helping the office run more efficiently.
- Round out your knowledge base.
- Further your career development.

“*The Essentials of Multiemployer Trust Fund Administration educational program thoroughly explained the different functions of our office and the specifics on the reason for their structure. I enjoyed interacting with my peers and learning what their offices were doing, so that we could further improve our operations.*”

Melissa Wetzel

Controller
Toledo Electrical Welfare Fund

Benefit Plan Professionals Institute for Accountants

www.ifebp.org/professionals

The Benefit Plan Professionals Institute for Accountants focuses on updates and trends of specific interest to auditors and accountants working with multiemployer plans. Stay abreast of the latest information on topics such as auditing, fraud, reporting and disclosure. The institute also provides many opportunities to interact and network with other accountants as well as attendees of the Trustees and Administrators Institutes.

Who Should Attend

The institute is designed for auditors and accountants who work closely with multiemployer benefit plans. This year's sessions provide information for the intermediate to more seasoned benefits professional.

Key Takeaways

- An informative and up-to-date program agenda with some sessions providing a broad perspective of the latest information on health and pension benefit issues and others providing a more detailed perspective
- Opportunity to earn meaningful continuing professional education (CPE) credits

Accompanying Educational Events

Trustees and Administrators Institutes

"The most comprehensive benefits education available. I would strongly recommend attending as many conferences as possible. The most complete avenue for keeping up to date on changes in benefit structure and legal responsibilities as a trustee."

Patrick Enright

Benefits Administrator

Bakers Local 433 Health and Welfare and Pension Funds

June 11-13, 2012

San Francisco Hilton

Union Square

San Francisco, California



ME

Topics

Administration, Economic Update, Health Care, Investments, Pension, Retirement

Meeting #09-12G1

Fees:

\$1,080 members

\$1,305 nonmembers

Registration fee through 4/30/12

This meeting includes continental breakfasts, lunches, welcome reception, networking reception, exhibit hall and beverage breaks.

Hotel:

San Francisco Hilton Union Square

Room Rate:

\$237 single/double

Registration Priority Code:

2CATUS

Conferences

June 18, 2012

Metro Meeting Centers—Boston
Boston, Massachusetts

Public Employee Benefits Update

www.ifebp.org/peupdate



PE

Topics:

Administration, Health Care,
Investments, Retirement



New name. New format for 2012!

The Public Employee Benefits Update replaces the longstanding Benefits Conference for Public Employees this year, in a cost-effective, time-efficient one-day format. We understand our public funds are facing many challenges. Redesigned to maximize your time and budget yet meet your fiduciary obligation to stay current, the update will present an extended day of concentrated education.

Maximum impact. Minimum time.

The Public Employee Benefits Update will offer a concise, substantive educational event.

- One-day program that makes the most of your time
- A series of one- or two-hour sessions that allow for more intensive study of the most important issues impacting you now
- Presented immediately prior to the CAPPPTM program in order to allow you to audit one of the highly rated CAPPPTM modules on day two (June 19) if you so choose and as space allows.

Who Should Attend

This conference is for key staff, deputies and managers in governmental agencies, municipalities and funds; trustees of governmental benefit plans, especially small- to mid-sized plans; departmental heads and supervisors; members of negotiating committees; and labor relations staff.

“As the director of California’s Department of Personnel Administration, I have responsibility for making sure that my staff are exposed to the best possible resources on employee benefits and benefit administration. The International Foundation provided the most up-to-date and comprehensive educational opportunities for my staff.”

Debbie Endsley
Director

State of California, Department of Personnel Administration

Meeting #A1-1226

Fees:

\$465 members
\$540 nonmembers
Registration fee through 5/10/12

Hotel:

Do not include hotel deposit.
Please book directly at the hotel of your choice.

Registration Priority Code:
2CATUS

Benefit Communication and Technology Institute

www.ifebp.org/benefitcommunication

Organizations are demanding that their benefit communications be demonstrably effective. They can't afford communications that look good and use the latest technology but don't get participants to take the actions they require. New laws and regulations, health care reform and funding for retirement are changing the way you operate your plans and communicate with participants. Technology advances and the explosion of social networking offer both challenges and opportunities for getting your participants the information they need when they need it.

The Benefit Communication and Technology Institute will bring you up to speed on the latest requirements, current trends and best strategies for communicating with your participants.

Who Should Attend

- Communications managers and consultants
- Trustees and administrators of multiemployer plans
- Corporate human resources directors and managers
- Public sector benefits managers and staff

Key Takeaways

- Understand the impact of new and proposed legislation on your communications plans.
- Learn how to help your participants navigate the changing retirement and health care landscapes.
- Discover how to use technology to help your participants help themselves.
- Pick the brains of industry experts and participate in hands-on learning experiences.
- Get a handle on key issues, trends and future direction.
- Hone your strategic planning and plain-language skills.
- Network with other professionals facing similar challenges, engage in productive dialogue, and come away with creative ideas and workable solutions.

The Benefit Technology seminar that I attended in August 2010 was exceptional and I learned so much about what other organizations are doing to stay in touch with staff. The speakers and programs were very informative.

Kathy Manto
Benefits Manager
Casey Family Services

June 25-26, 2012

The Pfister Hotel
Milwaukee, Wisconsin



Basic Intermediate Advanced



Topics

Administration, Communication, General Human Resources, Health Care, Retirement



Meeting #17-1217

Fees:

\$860 members
\$1,010 nonmembers
Registration fee through 5/14/12

This meeting includes continental breakfasts, a welcome reception and beverage breaks.

Hotel:

The Pfister Hotel

Room Rate:

\$189 single/double

Registration Priority Code:

2CATUS

Conferences

September 10-11, 2012

Hyatt Regency Monterey
Monterey, California



Topics

Administration, Collections,
Compensation, Fiduciary
Responsibility, Fraud,
General Human Resources,
Health Care, Investments,
Legal/Legislative Update,
Retirement

Meeting #16-1216

Fees:

\$860 members

\$1,010 nonmembers

Registration fee through 7/30/12

This conference includes continental
breakfast and a reception.

Hotel:

Hyatt Regency Monterey

Room Rate:

\$172 single/double

Registration Priority Code:

2CATUS

Collection Procedures Institute

www.ifebp.org/collections

The Collection Procedures Institute is designed to provide the practical information you need to fulfill your fiduciary obligation to collect the benefit payments due your funds. With expert professionals and practitioners sharing trends, legal and legislative updates, and best practices, you will obtain critical information that will help you benchmark your own policies and procedures. Networking with peers who face similar challenges will reinforce your learning experience. Register now to attend this valuable and timely institute.

Who Should Attend

- Trustees of multiemployer plans from both small and large funds in all industries
- Payroll auditors and collection coordinators
- Administrators
- Certified public accountants
- Attorneys
- Administrative staff in fund offices and third-party offices

Key Takeaways

- Items for action
- Networking and interactive sessions allow you to learn from your peers.
- Learn from experts the best practices being implemented.
- Hear how recent key legal decisions impact your plans.

“I have learned valuable information not only from the conferences that I have attended but also from other participants. The struggles they went through and how they resolved their problems. The actions that worked for their plan and the things that didn't work. You don't have to re-create the wheel but it is important to listen and observe others in your field who have experienced the same difficulties that you may be going through. I feel that the interaction and roundtables are extremely important in resolving problems.”

Joseph J. Stastny Jr.

Labor Trustee

Sheet Metal Workers Local #33 Cleveland

Employee Benefits Producer Training Program

www.ifebp.org/producertraining

The Employee Benefits Producer Training Program is an intensive two-week course for those who want to succeed as employee benefits sales professionals. Blending the International Foundation's respected employee benefits curriculum with The National Alliance's acclaimed Dynamics of Selling results in an unprecedented opportunity to learn the best in selling techniques as well as the complexities of health care and retirement programs.

Taught by seasoned practitioners, you will learn a proven sales process, develop successful selling skills and learn the technical side of employee benefits. In short, learn more—and earn more. You cannot afford to miss this valuable program.

Who Should Attend

- New producers
- Established producers who need to hone their skills within the employee benefits market
- Employee benefits sales professionals, including brokers and consultants

Key Takeaways

Immerse yourself in an intensive two-week course that will help you succeed as an employee benefits sales professional.

- Develop successful selling skills with a proven sales process as well as learn the technical side of employee benefits.
- Learn the best selling techniques as well as the complexities of health care and retirement programs.

2012 Program

Date and location to be announced



Topics

Administration, Health Care, Insurance Agency Operation, Investments, Sales Training, Retirement

“It was a great experience. I’ve been to producer schools in the past, but none were like this at all. It was very focused on the sales aspect of our job and combined the knowledge aspect that you need too.”

Joe Stopulos
Account Executive
Holmes Murphy & Associates



This program is the result of a partnership between The National Alliance for Insurance Education & Research and the International Foundation. This collaboration brings a one-of-a-kind program where sales training is meshed with employee benefits technical training to provide a comprehensive learning experience.

Wharton School Investment Courses

In partnership with the International Foundation



The International Foundation's longstanding relationship with the Wharton School brings prestige and excellence in education to you. Spanning over 30 years, the alliance has resulted in the distinguished CEBS designation as well as high-quality investment courses.



The Wharton School of the University of Pennsylvania, founded as the first U.S. business school in 1881, is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. As the most comprehensive source of business knowledge in the world, Wharton bridges research and practice through its broad engagement with the global business community.

Course Locations

The Wharton School
University of Pennsylvania

Classes in Philadelphia are held at the Steinberg Executive Conference Center of the Wharton School on the University of Pennsylvania campus. Lecture rooms offer a comfortable, state-of-the-art, environment conducive to adult learning.

Wharton | *San Francisco*

Wharton | *San Francisco* is a state-of-the-art educational facility designed to facilitate the learning style that Wharton has pioneered. Wharton | *San Francisco* is conveniently located in San Francisco's business and financial district in the historic Hills Brothers Building. Programs at Wharton | *San Francisco* draw their faculty and courses from the same world-renowned resources available at Wharton's Philadelphia campus.



Formed through in-depth, groundbreaking academic research and extensive industry experience, Wharton executive education programs offer a supportive and challenging context in which participants gain the skills necessary for their next level of executive development. Wharton's Aresty Institute of Executive Education serves up to 8,000 mid- to senior-level executives annually.

Through partnership programs, participants have the opportunity to engage with faculty who are the most-cited, most-published faculty of all top-tier business schools. With a profound influence on global business, Wharton faculty members are the sought-after, trusted advisors of corporations and governments worldwide.

Wharton School Investment Courses

In partnership with the International Foundation

Portfolio Concepts and Management

www.ifebp.org/wharton

Portfolio Concepts and Management lays the groundwork for the basic principles of portfolio theory and investment performance measurement. This 3½-day course offers the practical tools and experiences needed to make sound investment management decisions. Participate in lecture/discussion sessions, problem-solving exercises and small group breakout sessions. Build confidence in your ability to properly evaluate investments with a broad, integrated understanding of overall investment products and practices.

Who Should Attend

- Multiemployer and public plan trustees
- Administrators and staff
- Human resources and benefits professionals
- Corporate officers and executives
- Finance personnel
- Investment professionals
- Fiduciaries from both defined benefit and defined contribution plans
- Representatives of funds of various types, sizes and geographical areas (United States and Canada)

Key Takeaways

- Learn the basic tools and concepts needed for effective portfolio oversight.
- Obtain a solid grounding in the basic principles of portfolio theory and investment performance.
- Gain practical tools and experience needed to allow you to make better investment management decisions.
- Apply what you learn in an interactive case study.

May 21-24, 2012

The Wharton School
University of Pennsylvania
Philadelphia, Pennsylvania



Topics

Current markets, Investments, Portfolio Theory

Meeting #04-1204

Fees:

\$4,195 members
\$4,495 nonmembers
Registration fee through 4/9/12

This conference includes breakfasts, lunches, healthy snacks, beverage breaks and welcome reception.

Hotel:

Do not include hotel deposit.
Please book directly at
Sheraton University City Hotel
(877) 459-1146
www.philadelphiasheraton.com

Registration Priority Code:
2CATUS

“This course provides an excellent introduction to portfolio concepts and management. The professors are very bright and engaging. Combined with the group exercises, participants are fully prepared to manage their funds with a critical eye toward generating returns and making strategic decisions.”

Joseph Clark
Partner/Trustee

Jones Day/District of Columbia Retirement Board

Wharton School Investment Courses

In partnership with the International Foundation

July 16-18, 2012

Wharton | *San Francisco*
San Francisco, California

Hedge Funds, Real Estate and Other Alternative Investments

www.ifebp.org/wharton



Topics

Best Practices,
Current Markets, Investments

Meeting #H5-12H5

Fees:

\$3,225 members

\$3,450 nonmembers

Registration fees through 6/4/2012

This conference includes
continental breakfasts, lunches
and healthy snacks.

Hotel:

Do not include hotel deposit.
Please book directly at the
hotel of your choice.

Registration Priority Code:
2CATUS

This course provides practical education to help you understand the complexities of alternative investments. Focused on hedge funds and real estate investment, this advanced-level course will provide you with the tools to make effective investment decisions. The course schedule allows for 2½ days of lecture/discussion sessions, problem-solving exercises and group breakout sessions.

Who Should Attend

This course provides an advanced-level curriculum intended to build on participants' existing knowledge base. Those without investment course experience are encouraged to register for the Portfolio Concepts and Management course offered annually.

- Multiemployer and public plan trustees
- Administrators and staff
- Human resources and benefits professionals
- Corporate officers and executives
- Finance personnel
- Investment professionals
- Fiduciaries from both defined benefit and defined contribution plans
- Representatives of funds of various types, sizes and geographical areas (United States and Canada)

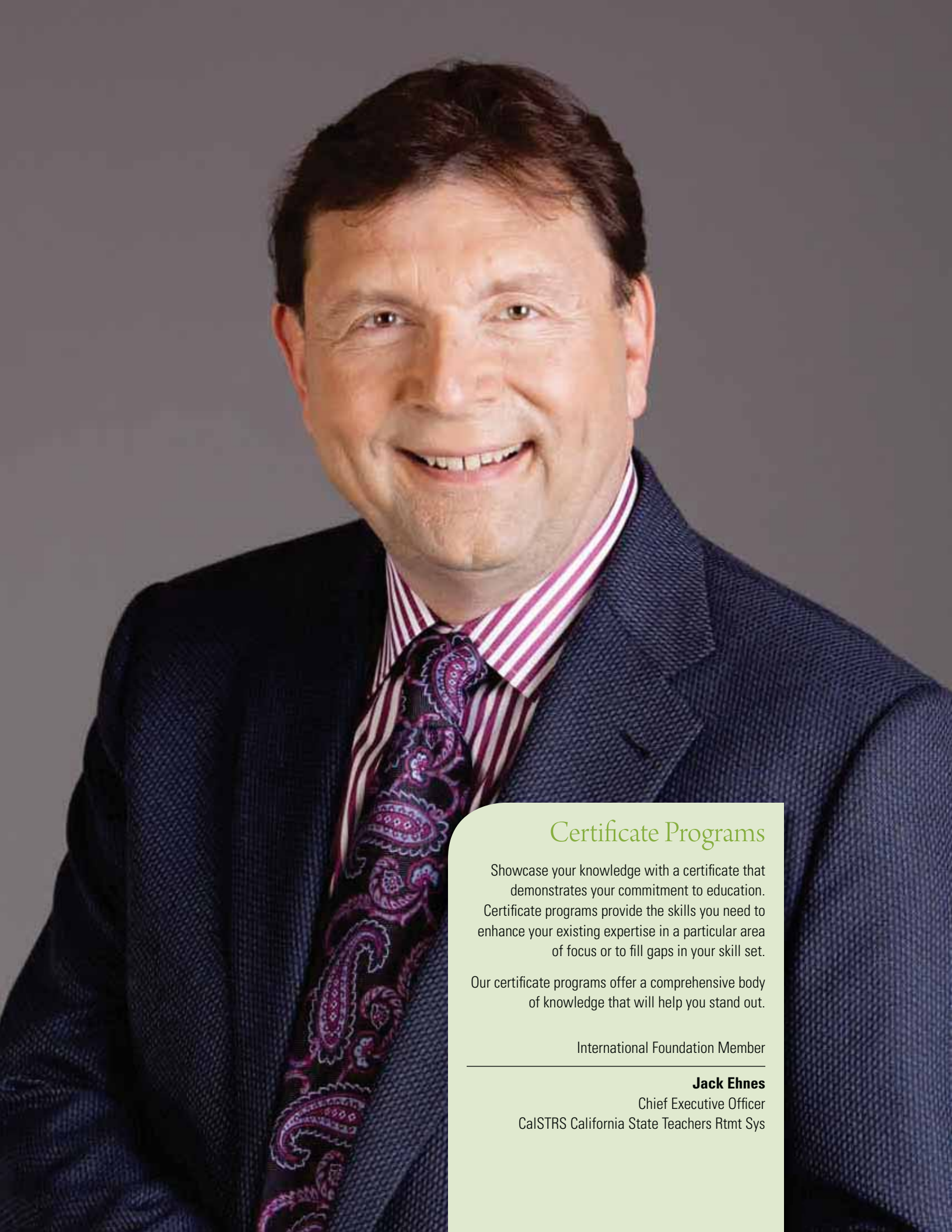
Key Takeaways

- Engage in a thorough and rigorous program that builds on participants' existing knowledge base and experience.
- Discuss steps in determining how much to allocate to alternative investments and which investment vehicles to choose.
- Assess performance history and correlation of alternative investments within the overall portfolio.

“As a finance committee member seeking to add hedge funds to our portfolio, this conference was extremely valuable. I feel more confident, knowledgeable and comfortable pursuing this asset allocation.”

Luther Medinaw

Vice President/Business Representative
Sheet Metal Workers' Local 105



Certificate Programs

Showcase your knowledge with a certificate that demonstrates your commitment to education. Certificate programs provide the skills you need to enhance your existing expertise in a particular area of focus or to fill gaps in your skill set.

Our certificate programs offer a comprehensive body of knowledge that will help you stand out.

International Foundation Member

Jack Ehnes

Chief Executive Officer
CalSTRS California State Teachers Rtmt Sys

Earning Certificates and Professional Designations

Never before has the need to demonstrate the value you bring to your organization been so important. The International Foundation's certificate-based and professional designation programs document your education and recognize your professional achievement.

Certificate Courses

When you complete a certificate program, you will have gained knowledge in a specific topic area, applied that knowledge in real-life case studies/group exercises, and have something to show for it—a Certificate of Achievement from the leading employee benefits educator.

International Foundation Certificate Course Options

Current certificate courses are offered via two- to five-day, face-to-face programs that offer an interactive learning environment. Certificate programs include

- Certificate Series
 - Benefit Plan Administration
 - Benefits and Compensation Management
 - Health Care Plans
 - Public Sector Benefits Administration
 - Retirement Plans
 - Certificate in Global Benefits Management
 - Certificate in Canadian Benefit Plans
- Trustees Masters Program® (TMP®)
- Administrators Masters Program® (AMP®)
- Certificate of Achievement in Public Plan Policy (CAPPPTM)

Professional Designations

If you want to stand out as a distinguished leader in employee benefits, the Certified Employee Benefit Specialist® (CEBS®) Program will deliver the results you want. In a competitive environment, designations can provide the edge you need to stand out from the crowd. Completing a respected designation program shows a high level of commitment and a thorough understanding of the essentials of your position.

Under the academic direction of the Wharton School of the University of Pennsylvania, the International Foundation offers the renowned Certified Employee Benefit Specialist (CEBS) program. Designations include

- CEBS (Certified Employee Benefit Specialist)
- GBA (Group Benefits Associate)
- RPA (Retirement Plans Associate)
- CMS (Compensation Management Specialist).



Certificate in Global Benefits Management

www.ifebp.org/global



The ever-increasing complexity of international employee benefits demands that professionals stay on top of the latest global developments. The Certificate in Global Benefits Management course consistently delivers the knowledge needed to be successful in managing and administering international employee benefit plans. The program is taught by expert professionals who will provide the latest information available on existing and emerging international employee benefits.

Who Should Attend

The course curriculum is designed to provide optimal education for

- Professionals working in benefits, compensation and/or human resources who have recently assumed responsibility for global benefits
- Professionals working internationally who are interested in expanding their global knowledge base
- Professionals working for organizations providing global benefit services to multinational employers.

Key Takeaways

- Gain a thorough education in the critical areas of global benefits management.
- Receive intensive training over 4½ days of instruction, allowing you to complete the certificate program in one trip.
- Obtain a solid foundation in international benefits and an enhanced understanding of the differences in benefit packages offered around the world.

March 12-16, 2012

Metro Meeting Centers—Boston
Boston, Massachusetts

June 25-29, 2012

The University of Chicago
Gleacher Center
Chicago, Illinois



Topics

Compensation, Health Care,
International Benefits, Retirement

Boston, Massachusetts

Meeting #47-1247

Fees: \$1,995 members
\$2,370 nonmembers

Registration fee through 1/30/12

Hotel: Do not include hotel deposit.

Please book directly at the hotel of your choice.

Registration Priority Code: 2CATUS

Chicago, Illinois

Meeting #46-1246

Fees: \$1,995 members
\$2,370 nonmembers

Registration fee through 5/14/12

Hotel: Do not include hotel deposit.

Please book directly at the hotel of your choice.

Registration Priority Code: 2CATUS

“The Global Benefits Management course was extremely comprehensive and gave me practical tools and reference material to use in my job.”

Karol McNutt

Director Employee Benefits
Insituform Technologies, Inc.

This conference includes continental breakfasts, lunches, beverage breaks and a welcome reception.

Certificate Programs



Topics

Compensation,
General Human Resources,
Health Care, Investments,
Retirement



Certificate Series Two-Day Course Registration

Fees:

\$970 members

\$1,120 nonmembers

(Late fee applies within 45 days
of course date.)

This meeting includes continental
breakfasts, lunches and beverage
breaks.

Hotel

Do not include hotel deposit with
your registration.

Hotel reservations are booked
directly by the participant.

Bring the Certificate Series to Your Location

Many organizations have recognized
the value of providing on-site
training to their employees. If you
have a large number of employees
who need training, contact the
International Foundation for
more information on hosting
Certificate Series courses. For more
information on program content or
to discuss hosting Certificate Series
courses, contact Tom DeRoche at
(262) 373-7648 or tomd@ifebp.org.

Certificate Series

www.ifebp.org/certificate-series

The Certificate Series offers comprehensive learning opportunities in each of the areas of total compensation. These instructor-led courses combine history and terminology with current events for a comprehensive learning experience. Take a single course for learning in a specific area or take three courses to earn a Certificate of Achievement in the discipline of your choice. Find solutions for today's challenges and prepare for tomorrow's opportunities through an enriching learning experience that combines valuable learning materials, outstanding instruction and networking to promote your knowledge and understanding of the major issues and trends in the employee benefits field.

Who Should Attend

Certificate Series courses are designed for those who require a quick but solid understanding of the issues, trends, legal and regulatory requirements, and operational aspects of designing, supporting and managing benefit and compensation plans, including

- Those managing benefits, compensation and/or human resources in a corporate, multiemployer or public sector setting
- Seasoned professionals looking to update their industry knowledge
- Administrative, customer service, call center and support staff who need to understand the industry they work in
- Human resource generalists who deal with plan participants
- Communications, marketing and sales professionals who must communicate with or develop communications for clients or participants
- Those professionals seeking to fulfill continuing education requirements for professional licensing or designations

- Those in all service sectors of employee benefits and compensation, including consulting firms, insurance companies, law and financial service firms, labor organizations and third-party administrators
- Small business owners and managers
- Those who are new to the industry or whose changing responsibilities require knowledge of benefits and compensation.

Key Takeaways

- Track the trends and strategies employers are implementing today and planning for tomorrow.
- Understand how regulatory changes impact your plan.
- Develop solutions to the challenges you face.
- Apply your knowledge through exercises and case studies.
- Receive valuable written materials, references and resources to use on an ongoing basis.
- Network with others who are dealing with similar issues.

Certificate Programs

Certificate Series 2012 Schedule

Course Name	San Diego, California	Brookfield (Milwaukee), Wisconsin	Washington, D.C.
Certificate in Benefits and Compensation Management			
Health Benefit Plan Basics*	March 5-6, 2012 MTG #81-1281		October 17-18, 2012 MTG #68-1268
Basic Compensation Concepts	March 7-8, 2012 MTG #81-1219		
Retirement Plan Basics*	March 9-10, 2012 MTG #81-1262	July 19-20, 2012 MTG #43-1243	October 17-18, 2012 MTG #68-1257
Certificate in Retirement Plans Take Required Courses			
Investment Basics*	March 7-8, 2012 MTG #81-1287	July 25-26, 2012 MTG #43-1253	October 19-20, 2012 MTG #68-1273
Retirement Plan Basics*	March 9-10, 2012 MTG #81-1262	July 19-20, 2012 MTG #43-1243	October 17-18, 2012 MTG #68-1257
And Choose One			
401(k) Plans	March 5-6, 2012 MTG #81-1299	July 23-24, 2012 MTG #43-1245	October 15-16, 2012 MTG #68-1276
Public Sector 401, 403, 457 Plans*			October 17-18, 2012 MTG #68-12N3
Certificate in Health Care Plans			
Health Benefit Plan Basics*	March 5-6, 2012 MTG #81-1281		October 17-18, 2012 MTG #68-1268
Choice-Based Benefits	March 7-8, 2012 MTG #81-1223		October 15-16, 2012 MTG #68-1274
Health Care Cost Management*	March 9-10, 2012 MTG #81-1236		October 19-20, 2012 MTG #68-1282
Certificate in Benefit Plan Administration			
Basics of Employee Benefits Administration	March 5-6, 2012 MTG #81-12K1		October 15-16, 2012 MTG #68-12K2
Managing Vendor Relations	March 7-8, 2012 MTG #81-12M1		October 19-20, 2012 MTG #68-12M2
Communicating Employee Benefits	March 9-10, 2012 MTG #81-12N1		October 17-18, 2012 MTG #68-12N2
Certificate in Public Sector Benefits Administration Take Required Course			
Introduction to Public Sector Benefits Administration			October 15-16, 2012 MTG #68-12P3
And Choose Two			
Public Sector 401, 403, 457 Plans*			October 17-18, 2012 MTG #68-12N3
Health Benefit Plan Basics*	March 5-6, 2012 MTG #81-1281		October 17-18, 2012 MTG #68-1268
Health Care Cost Management*	March 9-10, 2012 MTG #81-1236		October 19-20, 2012 MTG #68-1282
Investment Basics*	March 7-8, 2012 MTG #81-1287	July 25-26, 2012 MTG #43-1253	October 19-20, 2012 MTG #68-1273
Retirement Plan Basics*	March 9-10, 2012 MTG #81-1262	July 19-20, 2012 MTG #43-1243	October 17-18, 2012 MTG #68-1257

*These courses apply to more than one certificate.

Certificate in Global Benefits Management

Offered March 12-16 in Boston, Massachusetts and June 25-29 in Chicago, Illinois. For details and to register, visit www.ifebp.org/global.

Certificate in Canadian Benefit Plans

Offered October 8-10 in Toronto, Ontario. For details and to register, visit www.ifebp.org/canadacert.

Certificate Programs

CAPPP™

June 19-20, 2012

Part I—Health
Part I—Pensions

June 21-22, 2012

Part II—Health
Part II—Pensions

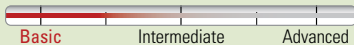
Metro Meeting Centers—Boston
Boston, Massachusetts



November 10-11, 2012

Part II—Health
Part II—Pensions

San Diego Convention Center
San Diego, California



PE

Topics

Investments, Health Care, Pension



Certificate of Achievement in Public Plan Policy (CAPPP™)

www.ifebp.org/cappp

The CAPPP™ program has become the place to begin trustee education in the public sector. This program is for the serious-minded trustee, providing in-depth exploration of the building blocks needed to fulfill one's fiduciary obligation. The program consists of a total of eight (8) modules, taught in four-hour increments over a total of four days. Teaching methods include group exercises, lecture and student interaction.

Faculty are drawn from practitioners in the public sector who are well acquainted with the real issues, allowing rich and current examples of actual situations. Class size is limited in order to foster a personal touch and comprehension.

Flexible enrollment options are available for CAPPP™. Part II can be taken before Part I.

How to Earn a Certificate

Earn a Certificate in Employee Pensions or a Certificate in Employee Health by attending Part I and Part II of a specific track. Each part consists of two days of instruction. The two-day parts can be taken independently or consecutively. To earn a CAPPP™ in either Employee Pensions or Employee Health, attendees are required to pass a takehome exam for each part. The takehome exams are

multiple choice that are based on the knowledge attendees have gained from the program. Attendees will be given their examinations at the conclusion of each part. Candidates will have 30 days to complete the exam and return it to the International Foundation for scoring (60 days if you take Parts I and II consecutively).



2012 CAPPP™ Schedule

Course Name	Boston, Massachusetts	San Diego, California
Part I—Health	June 19-20, 2012 MTG #A1-12A1	
Part I—Pensions	June 19-20, 2012 MTG #A1-12A1	
Part II—Health	June 21-22, 2012 MTG #A1-12A2	November 10-11, 2012 MTG #01-1218
Part II—Pensions	June 21-22, 2012 MTG #A1-12A2	November 10-11, 2012 MTG #01-1218

Who Should Attend

- Public sector benefit plan trustees of all levels of experience
- Representatives of public funds of various types, sizes and geographical areas who want a high-level overview
- Individuals who need a comprehensive understanding of public employee plan management at the policy-making level

Key Takeaways

- A cost-effective way to get thorough, on-target information to assist you in critical decisions
- An examination of the role of trustees and their relationship to other public benefit plan functions
- Firsthand knowledge shared by leading consultants and practitioners in the public benefits field
- Valuable resource materials for future reference
- An educational benchmark of excellence for the public sector
- A way to test your knowledge through a takehome exam.

Boston, Massachusetts

Fees:

\$925 members
\$1,075 nonmembers
Registration fee through 5/8/12

This conference includes continental breakfasts, lunches and beverage breaks.

Hotel:

Do not include hotel deposit.
Please book directly at the hotel of your choice

Registration Priority Code:

2CATUS

San Diego, California

Fees:

\$925 members
\$1,075 nonmembers
Registration fee through 9/29/12

This conference includes continental breakfasts and beverage breaks.

Hotel:

Visit www.ifebp.org/achotels.

Room Rate:

Various rates

Registration Priority Code:

2CATUS

“I have taken classes for CAPPP™ I, CAPPP™ II. I have found all the classes to be very informative and educational. The classes were recommended to me and I recommend them to others.”

Judith Refalo

Pension Analyst

City of Ann Arbor Employees' Retirement System

Certificate Programs



October 8-10, 2012
Toronto, Ontario



Topics

Administration, Health and Welfare,
Investments, Pension

Meeting #85-1285

Fees:

\$1,190 members

\$1,415 nonmembers

Registration fees through 8/27/2012

This conference includes
continental breakfasts, lunches
and beverage breaks.

Hotel:

Sheraton Centre Toronto Hotel

Room Rate:

\$229 (C\$) single/double

Registration Priority Code:

2CATUS

Certificate in Canadian Benefit Plans

www.ifebp.org/canadacert

Have you been charged with working with employees in Canada? Do you have a good perspective on the differences between the U.S. and Canadian employment laws and employee benefit plans? This program is designed to provide a solid foundation in the employee benefit and human resource practices in Canada—practices that are critical to working successfully with Canadian employees. Whether you are employed by a U.S. company with affiliates in Canada or you work with a Canadian plan, you will return to the office with practical information for taking on the challenges of conducting business in Canada.

Who should attend

- Human resource and financial professionals who work for U.S. companies with affiliates in Canada
- Those who work for Canadian firms with responsibility for employee benefit policies and procedures

Key Takeaways

- Thorough overview of the Canadian business environment
- An understanding of government-funded Canadian health care plans and drug benefit practices
- An extensive overview of private pension and other retirement arrangements

“I have gone to several International Foundation conferences. I enjoy the sessions where the speaker is passionate about the subject they are speaking on. It adds to my knowledge and makes me better at what I do.”

Tracy Wallace
Account Manager
Fickewirth & Associates

Administrators Masters Program® (AMP®)

www.ifebp.org/amp

The Administrators Masters Program® focuses on the enhancement of the skills that are unique to employee benefit plan administration. Candidates for the Administrators Masters Program® must attend two full days of classroom instruction AND attend three specially designated sessions offered during the Annual Employee Benefits Conference. As a graduate of the Administrators Masters Program®, you will receive a certificate of completion for your course work and a commemorative pin for attendance at the candidate sessions during the Annual Conference. You are then eligible to attend specially designed sessions for AMP® graduates during the Annual Conference.

Who Should Attend

The Administrators Masters Program® is intended for administrators who have five or more years of experience in administering employee benefit plans. The course is designed to stimulate and challenge administrators and administrative staff and representatives who provide services to multiemployer and public sector benefit plans.

Key Takeaways

- Develop leadership and management skills essential to the efficient and effective administration of the plans you serve.
- Apply learned knowledge and skills with your peers through participation in exercises, case studies and group activities.
- Dialogue on the industry's current issues, trends and best practices.
- Valuable written materials serve as an ongoing resource.
- Network with others who face similar challenges.

November 10-11, 2012

San Diego Convention Center
San Diego, California

*Held immediately prior to the
Annual Employee Benefits Conference*



Basic Intermediate Advanced



Topics

Administration, Communication,
Health Care, Leadership,
Retirement, Technology

Meeting #01-12E2

Fees:

\$970 members
\$1,120 nonmembers
Registration fee through 9/30/12

This program includes continental
breakfasts, working lunch on Saturday
and beverage breaks.

Hotel:

Visit www.ifebp.org/achotels.

Room Rate:

Various rates

Registration Priority Code:

2CATUS

Certificate Programs

November 10-11, 2012

San Diego Convention Center
San Diego, California

*Held immediately prior to the Annual
Employee Benefits Conference*



Topics

Communication, Health Care,
Leadership, Retirement, Technology,
Investments

Meeting #01-12D2

Fees:

\$970 members

\$1,120 nonmembers

Registration fee through 9/30/12

This conference includes continental
breakfasts and beverage breaks.

Hotel:

Visit www.ifebp.org/achotels.

Room Rate:

Various rates

Registration Priority Code:

2CATUS

Trustees Masters Program® (TMP®)

www.ifebp.org/tmp

The newly redesigned Trustees Masters Program® (TMP®) is for experienced trustees who want to think and act more boldly, systematically and proactively. It is designed to build on a trustee's existing knowledge base and experience. Candidates for the Trustees Masters Program® must attend two full days of classes. As a graduate of the Trustees Masters Program®, you will receive a certificate of completion for your course work. After attending specially designed sessions offered on the first day of the Annual Employee Benefits Conference, you will receive a commemorative pin. Graduates are welcome to return and attend any of the TMP® graduate sessions or special summit offered prior to the Annual Conference each year.

Who Should Attend

The Trustees Masters Program® is designed for trustees who have five or more years of experience and who have attended at least two International Foundation conferences.

Key Takeaways

- Concrete ideas for tackling specific issues
- Proven practices that work
- Extensive networking across industries and the country
- Earn special recognition for your knowledge and participation with a TMP® certificate and pin.
- Participate in exclusive TMP® graduate sessions offered at each Annual Conference.

TMP® Advanced Leadership Summit

www.ifebp.org/tmpsummit

The TMP® Advanced Leadership Summit is an opportunity to delve deeper into relevant topics critical to a fund's overall strategy—what will trustee leadership look like in the future? What are the challenges and prospective solutions for forward-thinking organizations? The topical focus of the TMP® Advanced Leadership Summit changes from time to time to reflect the most critical issues facing trustees.

Who Should Attend

The TMP® Advanced Leadership Summit is for those who have earned the TMP® certificate of completion and commemorative pin.

Benefits of Attending

- Collaborative learning environment with expert instruction
- Dialogue on the issues most important to trustees

November 11, 2012

San Diego Convention Center
San Diego, California

Held immediately prior to the Annual Employee Benefits Conference



Basic Intermediate **Advanced**



Topics

Leadership

Meeting #01-12D3

Fees:

\$485 members
\$560 nonmembers
Registration fee through 9/30/12

This conference includes continental breakfast and beverage breaks.

Hotel:

Visit www.ifebp.org/achotels.

Room Rate:

Various rates

Registration Priority Code:

2CATUS

“The Trustees Masters Program® provided tools to enhance my ability to perform my duties as an employee-elected pension trustee.”

Nancy K. Yendes

Public Employee

MO Local Government Group Retirement System

Our Commitment to the Future of Benefits

Retirement Security

The current legislative and financial climate has generated unprecedented levels of concern about the future of retirement and financial security amongst all Foundation members. It stems from a confluence of events that include the country's worst financial crisis since the Great Depression, the changing role of the employer in the provision of retirement benefits, expanded accounting and regulatory disclosures, and liabilities and the ever-increasing costs of health care.

Value-Based Health Care

As the cost of providing health care benefits to plan participants continues to increase, organizations are looking for ways to rein in costs while providing effective options for improving workers' health. One model that can help solve the health care challenges of plan sponsors—and the health care system overall—is value-based health care (VBHC). The International Foundation is undertaking a long-term, multistep project including the creation of a tool kit that will walk plans through the process of adapting a VBHC approach.

VBHC is a holistic, consumer-centered approach that focuses not on the dollars being spent but on how the dollars being spent work toward improving employees' health. It involves a broad spectrum of actions, including those on the part of consumers, employers and providers. Healthier and more productive employees result in a better return on health care investment, positively impacting an organization's bottom line.





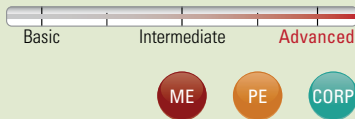
 Professional Designations

Pride in accomplishment, respect for achievement— Professional designations demonstrate commitment and reflect a level of knowledge that can be obtained by only those with a disciplined focus and a passion for learning. The Certified Employee Benefit Specialist® (CEBS®) Program offers four designations. Each will put you in a respected category of achievers.

International Foundation Member

Shirley A. Dwyer, CEBS
Director Employee Benefits
WellSpan Health

CEBS Professional Designations



Topics

Administration, Compensation, General Human Resources, Health Care, Investments, Retirement, Personal Wealth Management

How to Register

Find complete registration information including forms at www.cebs.org

Phone

(800) 449-2327, option 3
(262) 786-6710, option 3

Fax

(262) 364-1818

E-Mail

cebs@ifebp.org

Certified Employee Benefit Specialist® (CEBS®) Program

www.ifebp.org/cebs

Set yourself apart with a professional designation. A high sense of achievement, competitive edge, industry recognition, higher compensation, and opportunities for job promotion and career enhancement are a few of the benefits of earning a designation.

The CEBS program offers you the opportunity to earn designations in three distinct areas of specialization: group benefits, retirement and compensation. Earn a designation in each of the specialty tracks and, at the same time, receive credit that will qualify toward earning the CEBS designation.

The structure and flexibility of CEBS is a perfect fit with the needs and expectations of today's benefits and compensation professionals.

Benefits of Participating

- An opportunity to earn a unique series of credentials backed by one of the world's preeminent educational institutions. The Wharton School of the University of Pennsylvania is responsible for all academic standards, including curriculum and examinations.
- Education can be tailored around areas of specialization and interest, and the flexible curriculum and availability of online classes help meet individual time commitments.
- Designations are powerful tools for display on your business card or including on your resumé.

CEBS Is Designed for

Individuals representing all sectors of the total compensation field: industry plan sponsors, consulting firms, health maintenance organizations, insurance companies, banks, hospitals, administration, investments, labor organizations, public employers and professional associations dealing with employee benefits.

The Wharton School Partnership

Since the inception of the CEBS program in 1977, the International Foundation has been privileged to partner with the Wharton School. Recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education, the Wharton School and its highly accredited faculty serve as one of the most comprehensive sources for business knowledge in the world. This unique partnership distinguishes CEBS and its university-based curriculum from other total compensation designation programs. In their partnership roles, the Foundation is responsible for program administration, and the Wharton School is responsible for all academic standards as well as curriculum and examinations.

CEBS Professional Designations

CEBS—A total compensation credential recognized for the depth and breadth of critical knowledge achieved, CEBS is the most recognized and respected benefits designation in the industry. Earn your CEBS by successfully completing eight courses designed by the Wharton School of the University of Pennsylvania.

GBA—The Group Benefits Associate (GBA) designation is an ideal fit for those dealing with health and other group benefits. The three-course curriculum covers design, administration and communication of group benefits.

RPA—The Retirement Plans Associate (RPA) designation is a great credential for those who work with defined contribution and defined benefit plans, as well as those involved with the management of plan assets.

CMS—The Compensation Management Specialist (CMS) designation demonstrates expertise in human resources and compensation practices. It reviews the principles of human resources, compensation design and administration, and executive compensation.

Online Study and Class Options

All CEBS courses are designed for self-study. To enhance your learning, online classes and formal classes in select locations are available. The online classes provide even more resources to help you master the material. Take the guided tour and check out all of the online class features at www.cebs.org. For formal class locations, see www.cebs.org.

Examinations

CEBS examinations are computer-based and are offered year-round with instant grade results.

Continuing Professional Education Credit

Many insurance professionals use CEBS courses to meet licensing and other continuing education requirements. Credit hours and filing procedures vary by discipline and from state to state. Please visit our website at www.cebs.org under the Student Resources Section, or contact the Continuing Education Department at the International Foundation.

CEBS Certified Employee Benefit Specialist

Six required courses:

GBA 1 —	Group Health Plan Design
GBA 2 —	Group Benefits Management
RPA 1 —	Retirement Plan Design
RPA 2 —	Retirement Plan Management
CMS 1 —	Human Resources and Compensation Management
CMS 2 —	Compensation Concepts and Principles

Two electives (any two of the following CEBS courses):

GBA 3 —	Health Care: Financing, Quality and Reform
RPA 3 —	Asset Management
RPA 4 —	Personal Wealth Management
CMS 3 —	Executive Compensation

GBA Group Benefits Associate

Complete these CEBS courses:

GBA 1 —	Group Health Plan Design
GBA 2 —	Group Benefits Management
GBA 3 —	Health Care: Financing, Quality and Reform

RPA Retirement Plans Associate

Complete these CEBS courses:

RPA 1 —	Retirement Plan Design
RPA 2 —	Retirement Plan Management
<i>And one of the following CEBS courses:</i>	
RPA 3 —	Asset Management
RPA 4 —	Personal Wealth Management

CMS Compensation Management Specialist

Complete these CEBS courses:

CMS 1 —	Human Resources and Compensation Management
CMS 2 —	Compensation Concepts and Principles
CMS 3 —	Executive Compensation

Custom Training and Meeting Management

Contract/Custom Training

Let us tailor educational programs to your organization. Our custom programs draw on the expertise of our staff and experience as a leading educator. We will team up with you to offer specialized programming at your own facility or we can help coordinate a site that suits your needs.

Customized Training

The International Foundation regularly works with companies, trust funds, unions, associations and other organizations to develop customized educational programs that meet their specific needs and objectives. Please contact Tom DeRoche at (262) 373-7648 or tomd@ifebp.org for more information or to set up a program.

CEBS

We will help you coordinate customized online study groups, in-house classes or study groups. Contact Linda Bielski at (262) 373-7671 or lbielski@ifebp.org.

Certificate Series

Host a Certificate Series course at your location and save on travel costs and time away from work while providing learning and development opportunities for your staff and/or clients. Content customization is also available. Please contact Tom DeRoche at (262) 373-7648 or tomd@ifebp.org for more information or to set up a program.

E-Learning

E-learning courses can be customized to meet your organization's business needs and/or branding. For more information, contact Barb Swarhout at (262) 373-7668 or barbs@ifebp.org.

Your Full-Service Meeting Logistics Partner

Let us leverage our relationships with conference centers, hotels and vendors to put together a seamless event for your organization. Our qualified staff of certified meeting professionals (CMPs) will assist you with planning your meeting, connecting you to the services needed to execute a successful event. Let us take the pressure and tedious tasks off your hands.

Our Services

- Meeting Management—A talented team of Certified Meeting Professionals (CMPs) will assist you with planning your meeting.
- Exhibits—Create a positive experience
- Registration—Full-service in-house team
- Housing Assistance—Manage and coordinate communication
- Audiovisual—Technical skills, equipment and experience
- Marketing—Including design and printing services
- Transportation—Shuttle bus and airport transportation

Put the power of the Foundation's experienced meeting and event management services team to work for you. For more information, contact Kathryn Gleesing at (262) 373-7660 or kathryng@ifebp.org.

How We Can Help You

- Secure desirable space for receptions, meetings and special events.
- Negotiate contracts for venues, hotels and vendors.
- Coordinate meeting requirements with suppliers and facilities.
- Assist in food and beverage planning.
- Arrange hotel rooms and manage your room block for your participants.
- Registration processing and badge/ticket production
- On-site logistical management and technical support



Online Learning

Education available anywhere, anytime provides you with the knowledge you need. Access online learning from your office, home or favorite coffee shop. The latest updates, regulations and new legislation are available virtually anywhere to provide you with the information you need in this changing benefits environment.

Our catalog of e-learning courses grows each month to keep you informed on the latest legislation and benefit issues. Webcasts also provide up-to-the-minute updates on the hottest issues, giving you the opportunity to be the first in the know.

International Foundation Member

Laurie A. Mele

Vice President Midwest Region
William C Earhart Co Inc

E-Learning Courses

www.ifebp.org/elearning

The International Foundation's e-learning courses are designed to provide you with information that will help you stay informed and compliant without the need for travel. Each course is self-paced, allowing you to bookmark your progress so you can quickly return to where you left off in the course.

Benefits of Using E-Learning Courses

- Quality, timely and cost-effective education
- Course content developed by industry professionals and experts
- As effective as classroom learning—without the travel costs and time away from the office
- Continuously updated course content to reflect the latest regulatory changes
- Recertification credit for PHR, SPHR and GPHR, and insurance licensing continuing education credit

Course Features

- Real-life applications to provide everyday examples of course content
- Interactive games and scenarios to test your comprehension of course material
- Access for 180 days with bookmarking capability
- Final exam or quiz to assess your knowledge
- Certificate of successful completion after passing the final exam with a 70 or higher score as well as viewing every page of every lesson

Course Formats

Courses range from one to four hours in length, and are available in two formats: interactive text and audiovisual. Each course is designed for one individual student and is nontransferable.

Interactive Text



Interactive text courses provide a number of helpful features for enhancing the learning experience. Each course contains:

Each course contains:

- Helpful check-your-knowledge questions
- Real-life applications to increase comprehension
- Knowledge builders to provide additional information
- Interactive game reviews following each lesson
- A final exam to test your knowledge.



Audiovisual



Each audiovisual course contains:

- A PowerPoint presentation with audio that covers in-depth information
- A prerecorded question-and-answer session with real-life questions from your peers
- A ten-question quiz to test your knowledge
- Access to print PowerPoint materials (newer courses only).



Team-Training Solutions

Looking for a cost-effective way to train your team? Consider bulk-pricing, tokens or E-Learning Enterprise Solutions.

Bulk Pricing

If your organization has multiple employees who need training, bulk-pricing discounts can save you up to 50%. Selected students will be immediately enrolled in a course that can be completed in their own time frame. A monthly pass/fail report is available so managers can track the progress of their staff.

Tokens

With tokens, you receive the same bulk-pricing discount but have the flexibility of purchasing multiple course hours without selecting specific courses or individuals to be trained. Each course hour equals one token, and purchased tokens can be distributed throughout the year to allow any individual in your organization to enroll in an e-learning course of your choosing. Again, a monthly pass/fail report is available.

E-Learning Enterprise Solutions

Our E-Learning Enterprise Solutions make training easy by giving your organization the power to provide interactive training and real-world solutions to a large number of staff at one time. Choose from more than 50 courses, all of which can be transferred into your Learning Management System (LMS).

Through your LMS, managers will have the opportunity to administer training and view reports on log-in activity, course progress and assessment scores. Courses can be tailored to any organization’s unique business or training needs.

With this option, organizations purchase course licenses for each user, and have an initial \$2,500 administrative transfer fee and \$2,500 update/maintenance fee for each course. (These fees are waived for purchasers who buy more than 2,500 hours.)

Team-Training Pricing

E-learning team-training pricing is significantly discounted from our individual course prices, making it an affordable training option that is easy, consistent and timely in its delivery throughout your organization. See the chart below for the base pricing that applies to bulk pricing, tokens and enterprise solutions.

Course Hours	Member	Nonmember	Discount
0-25	\$40	\$50	
26-99	\$36	\$45	10%
100-199	\$34	\$43	15%
200-499	\$32	\$40	20%
500-999	\$30	\$38	25%
1,000-1,499	\$26	\$33	35%
1,500-1,999	\$24	\$30	40%
2,000-2,499	\$22	\$28	45%
2,500+	\$20	\$25	50%

For more information about team-training options, visit www.ifebp.org/elearning/teamtraining; or contact Barbara Swarouth at (262) 373-7668 or barbs@ifebp.org.

E-Learning Courses

www.ifebp.org/elearning

General Benefits

Communication



Strategic Benefits Through Employee Involvement

A committee of employees can create an employee environment of ownership, appreciation and shared responsibility for their company's benefit programs. Learn how to implement and facilitate an employee benefits committee, and the strategies and consideration inherent in an effective employee benefits committee.

\$50 (I.F. Members \$40). Item #ET16.

Special Topics



Life and Accidental Death and Dismemberment

This course explains the different types of life insurance, including whole life, term life, universal life and business-oriented life policies as well as the basics of underwriting and eligibility.

\$100 (I.F. Members \$80). Item #EL20.



Ethics for Insurance Agents

This course is designed to reinforce an insurance producer's ethical competence and to contribute to an agent's understanding of the complexities of ethical decision making in the insurance industry.

\$150 (I.F. Members \$120). Item #EL16.



Fiduciary Responsibility

This course provides a general overview and review of fiduciary responsibilities. Learn who is a fiduciary, how to limit liability and the significance of being a fiduciary.

\$50 (I.F. Members \$40). Item #EL24.



Investment Basics

This course provides an introduction to general investment terms and concepts. The material contained in this course is not limited to investments in a retirement plan or to an individual's portfolio, but rather it covers the broad concepts and topics that affect all investments.

\$50 (I.F. Members \$40). Item #BLUE-9719.

Special Topics



Long-Awaited Regulations on Americans with Disabilities Act: Information You Need to Know

On March 25, 2011, more than two years after the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) went into effect, the Equal Employment Opportunity Commission issued its final revised regulations and accompanying interpretive guidance in order to implement ADAAA. These long-awaited regulations became effective on May 24, 2011, and significantly impact human resources and benefits professionals in organizations nationwide. This course is designed to bring employers up to date on compliance requirements and obligations under ADA (Title I) and ADAAA.

\$50 (I.F. Members \$40). Item #BLUE-9729.



Short- and Long-Term Disability

This course identifies the most common definitions of disability and helps you understand eligibility requirements for short- and long-term disability.

\$100 (I.F. Members \$80). Item #EL19.

Special Topics



USERRA

This course provides information on the elements of the Uniformed Services Employment and Reemployment Rights Act (USERRA), including service limits, documentation requirements, health coverage continuation, the compliance process and the ramifications of noncompliance.

\$150 (I.F. Members \$120). Item #EL14.



Vendor Management

This course will help you tackle the vendor selection process and the various fee calculation methods, identify systems and maintain an effective ongoing relationship when deciding to use an outsourced partner.

\$200 (I.F. Members \$160). Item #EL18.

E-Learning Course Formats

Courses are available in an **interactive text format** and **audio/visual format** (expert lecture recording).



1-hour
Interactive Text



2-hour
Interactive Text



3-hour
Interactive Text



4-hour
Interactive Text



1-hour
Audio/Visual

Special Topics



Vendor Selection—Balancing the Needs of the Sponsor, Participants and Vendors

There are many things to consider when deciding to use an outsourced partner/vendor. This course is designed to provide you with the generic tools necessary for making this process efficient—and, more importantly, successful.

\$50 (I.F. Members \$40). Item # BLUE-9670.



Form 5500— Quarterbacking Your Efforts for E-Filing

Effective for plan years beginning on or after January 1, 2009, the DOL requires employers to file Form 5500 annual reports for their health and welfare and retirement plans electronically. This course focuses on electronic signing credentials, details and tips for the e-filing process, and the changes to schedules.

\$50 (I.F. Members \$40). Item #BLUE-9665.



Americans with Disabilities Act (ADA)

The Americans with Disabilities Act of 1990 (ADA) was enacted on July 26, 1990, and became effective on July 26, 1992 for most employers. ADA is a wide-ranging civil rights law that prohibits, under certain circumstances, discrimination based on disability. Further, ADA affords a broad series of protections against discrimination for Americans with disabilities. This course goes into depth on Title I of ADA which specifically provides protection from employment discrimination to qualified applicants and employees with disabilities.

\$50 (I.F. Members \$40). Item #BLUE-9687.

Compensation



Introduction to Compensation

Compensation planning is an important tool that can be used to help maximize profitability, sustain growth and attract and retain the right employees. Topics covered in this course include how to develop a compensation philosophy and strategy, and how to conduct job analyses and evaluations as well as how to develop a pay structure.

\$200 (I.F. Members \$160). Item #EL05.

Family and Medical Leave



Family and Medical Leave Act (FMLA)

This course identifies employer responsibilities and teaches you how to avoid common mistakes, implement best practices and comply with, and be aware of, interaction with other laws.

\$100 (I.F. Members \$80). Item #EL17.

Family and Medical Leave



Trends and Challenges in Administering FMLA

Every employer must deal with Family and Medical Leave Act (FMLA) requests and determine how to handle them within state and federal law guidelines. This course discusses the challenges and options as well as the latest trends in administering FMLA.

\$50 (I.F. Members \$40). Item #ET19.

Health Care

COBRA



COBRA

This course covers the basics of COBRA requirements and what triggers the obligation to offer COBRA, who must provide COBRA notices and how long COBRA lasts. It also includes information related to the COBRA Premium Assistance Law.

\$200 (I.F. Members \$160). Item #EL07.

ERISA



ERISA

This course covers the structure of ERISA, the enforcement of ERISA and plan requirements of ERISA including summary plan descriptions (SPDs) and annual reports.

\$150 (I.F. Members \$120). Item #EL13.

HIPAA



HIPAA Privacy

This course is an excellent tool for annual training for you or your team. It provides a general overview of HIPAA Privacy, including who and what is covered by the Privacy Rule, using PHI and additional administrative requirements.

\$50 (I.F. Members \$40). Item #EL25.



HIPAA Privacy Rules Refresher

Many health plans and business associates may be due for a refresher on the original HIPAA Privacy Rules and all their changes, including the new, proposed regulations issued in July 2010. Schedule a department or staff meeting and quickly bring everyone up to date on HIPAA privacy.

\$50 (I.F. Members \$40). Item #BLUE-9705.

E-Learning Courses

www.ifebp.org/elearning

HIPAA



HIPAA Security

HIPAA-covered entities must create and document their compliance with a HIPAA security plan. This course covers the general requirements of the Security Rule, administrative safeguards, physical safeguards, security standards and documentation requirements.

\$50 (I.F. Members \$40). Item #BLUE-9631.



Wellness Programs and HIPAA Compliance— What's New—What's Working in Practice?

If you have, or are starting, a wellness program, this course covers what you need to know to make sure your wellness programs are HIPAA-compliant.

\$50 (I.F. Members \$40). Item #ET44.

Medicare



Medicare: What's New and What's Changing Next?

Medicare changes every year with new premiums, new deductibles and new copays. With health care reform, Medicare will be changing in significant ways designed to alter the way health care is delivered in this country. The Patient Protection and Affordable Care Act (PPACA) calls for numerous changes including improvements for patients and providers, payment accuracy improvements, provisions related to Part C, Part D improvements, and changes designed to improve sustainability, transparency, enforcement and integrity.

\$50 (I.F. Members \$40). Item #BLUE-9721.

Prescription Drugs



Prescription Drugs

This course covers marketplace and financial trends, formularies, drug utilization review, evaluation and selection of a pharmacy benefit manager, and pharmacy innovations.

\$150 (I.F. Members \$120). Item #EL22.



Specialty Pharmacy and Biotechnology Medication Coverage

This course covers the fastest growing area of overall pharmacy benefit spending. Topics covered include key aspects of specialty pharmacy benefits, benefit design decisions, characteristics of specialty pharmacy vs. traditional medications, and general trends and future issues.

\$50 (I.F. Members \$40). Item #BLUE-9624.

Prescription Drugs



Information You Need to Decrease Specialty Drug Costs

Organizations need to learn more about controlling large costs like those for specialty drugs. Experts estimate that between 10% and 25% of all drug costs are currently for specialty drugs, and specialty drug costs are expected to grow exponentially in the coming years. Attend this course and discover what you need to know to effectively decrease and control specialty drug costs.

\$50 (I.F. Members \$40). Item #BLUE-9697

Wellness



Wellness and Disease Management

This course provides a comprehensive overview of worksite wellness and disease management. Topics covered in this course include the business case for worksite wellness, managing health risks and the role of chronic disease management.

\$150 (I.F. Members \$120) Item #EL23.



The Business Case for Employee Health and Well-Being

This course covers the relationship of employee health to health costs and productivity, what successful companies are doing, and case studies proving that workplace health improvement works.

\$50 (I.F. Members \$40). Item #ET41.

General Information and Special Topics



How to Do a Dependent Audit

Learn which employers are good candidates for an audit, whether to use in-house resources or an outside vendor, the four phases of an audit and how to minimize the legal risks that may arise out of an audit.

\$50 (I.F. Members \$40). Item #BLUE-9588.



Introduction to Health Care and Group Benefit Plans

This course explains how to differentiate the various types of group health medical benefits available, the basics of defined contribution and consumer-driven health plans, and the changes taking place due to health care reform annually between 2011 and 2014.

\$200 (I.F. Members \$160). Item #EL03.

General Information and Special Topics



Using VEBA's to Manage Retiree Medical Liabilities

This course reviews developments regarding VEBA's with emphasis on the practical implications for employers and VEBA trustees. Other topics covered include the tax and ERISA requirements applicable to VEBA's, and pros and cons of using VEBA's to manage retiree medical liabilities.

\$50 (I.F. Members \$40). Item #ET33.

Health Care Reform



Benchmark Your Health Plan's Administrative Costs and Services

This presentation describes the benefits to employers of benchmarking the administrative performance of employee health plans. Administrative activities comprise health plan costs that are often overlooked and shape an employee's perception of health plan benefits. They also constitute an area that employers can influence with positive results. Benchmarking data included in the presentation illustrate the wide variations in administrative costs among plans. The speakers demonstrate how these benchmarks can provide an objective basis for assessing vendor and internal administrative performance. Attendees will learn how benchmarks are an important tool for controlling costs while maintaining quality and service levels that employees and other plan participants expect.

\$50 (I.F. Members \$40). Item #BLUE-9730.



Dependent Audits—Does Health Care Reform Make Them Obsolete or More Important Than Ever?

Health care reform impacts employers in many ways, and the need for cost control has only increased in light of these new regulations. With anticipated health care cost increases of over 9% in 2011 and expanded coverage requirements having an upward impact on employer expense, there are still ways to ensure you are maximizing your cost-containment efforts. Dependent eligibility verification is still an extremely critical component of a plan manager's effective cost-containment strategy. This is true even with the implementation of these new regulations.

\$50 (I.F. Members \$40). Item #BLUE-9728.

Health Care Reform



Health Care Reform Update

With comprehensive health care reform a reality, plan sponsors across the United States are waiting to learn what they must do—and what they can do—immediately, six months from now and over the next few years. The reform will profoundly influence benefit design, cost and eligibility rules. This timely course addresses the key elements of the Patient Protection and Affordable Care Act (HR 3590) and the related provisions of the Health Care and Education Reconciliation Act (HR 4872).

\$50 (I.F. Members \$40). Item #BLUE-9676.



Health Care Reform: A Six-Month Checkup

The federal agencies charged with implementing the Affordable Care Act have been busy. Over the last six months, the agencies have published regulations on a multitude of new health care reform requirements. And just to make things more interesting, the agencies are now issuing "subregulatory" guidance on specific topics. This course reviews the guidance issued to date, and focuses on agency progress in implementing various new programs.

\$50 (I.F. Members \$40). Item #BLUE-9714.



Looking Ahead to the Health Care Exchanges: What You Need to Know Now

Health insurance exchanges are a central element of the health reform law. But the organization and operation of the exchanges raises many questions.

\$50 (I.F. Members \$40). Item #BLUE-9722.



New Claims and Appeals Rules Under PPACA

On August 23, the Department of Labor (DOL) and Health and Human Services (HHS) released the new model forms and interim guidance on the federal external review process under PPACA. Benefits professionals need to get up to date on this new guidance.

\$50 (I.F. Members \$40). Item #BLUE-9702.

E-Learning Course Formats

Courses are available in an **interactive text format** and **audio/visual format** (expert lecture recording).



1-hour
Interactive Text



2-hour
Interactive Text



3-hour
Interactive Text



4-hour
Interactive Text



1-hour
Audio/Visual

E-Learning Courses

www.ifebp.org/elearning

Retirement



Defined Contribution Plans

This course reviews key aspects of defined contribution (DC) plans. Topics covered include the different types of DC plans, and rules on employer and employee contributions, as well as the distribution, reporting and disclosure of DC plans.

\$100 (I.F. Members \$80). Item #EL10.



401(k) Plans

This course provides an intermediate look at 401(k) plans, including topics on actual deferral percentage (ADP) and actual contribution percentage (ACP) basics, participant loans, automatic enrollment and matching contributions. The course also delves into eligibility requirements, maximum salary deferrals, allocation conditions, loan program design and plan terminations.

\$200 (I.F. Members \$160). Item #EL15.



401(k) Fee Disclosure: What You Need to Know and What You Need to Do

This course reviews the recently released and long-awaited Participant and Plan Sponsor 401(k) Fee Transparency Final Regulations recently issued by the Department of Labor. The presenters focus on information that plan sponsors need to know now and actions they may want to take moving forward.

\$50 (I.F. Members \$40). Item #BLUE-9715.



What to Expect—and Require—From 401(k) Recordkeepers

This course covers plan document provisions, compliance requirements, outsourcing, service agreements, and plan sponsor and participant needs.

\$50 (I.F. Members \$40). Item #BLUE-9604.



Defined Benefit Plans

This course covers topics that include the different types of defined benefit plans, pay- and service-related defined benefit formulas, features of defined benefit plans and distribution, reporting and disclosure.

\$100 (I.F. Members \$80). Item #EL11.



Choosing a Target Date (Lifecycle) Fund Family

With the passage of the Pension Protection Act and the creation of Qualified Default Investment Alternatives (QDIAs), lifecycle funds have moved to the forefront of 401(k) investment options. Find out what's important and what's not, as well as potential risk traps and what fund companies are doing to offset them.

\$50 (I.F. Members \$40). Item #ET39.



Overview of Retirement Plans

This course is designed to provide a solid overview of retirement plans, including the history and objective of retirement plans, what qualifies as an income source in retirement, what role plan sponsors play, and the differences between defined benefit and defined contribution plans.

\$100 (I.F. Members \$80). Item #EL09.



Multiemployer Plan Attorneys—2010 Pension Relief Act Guidance And Valuable Approaches

While many boards of trustees need to take advantage of the defined benefit pension funding relief that is now law, they, along with their actuaries and administrators, will be looking to their attorneys for interpretive guidance and comfort in adopting valuable approaches. This course features an attorney and an actuary who have delved into the 2010 Pension Relief Act details and good-faith compliance options with their clients, and they share their insights and experiences.

\$50 (I.F. Members \$40). Item #BLUE-9707



Need-to-Know Updates About Recent Retirement Regulations

In 2010, there have been numerous regulations issued (final and proposed) by various agencies (IRS, DOL, SEC) that impact retirement plans. This course covers the most significant regulations addressing both the requirements of the regulations and the impact on plan sponsors and plan service providers.

\$50 (I.F. Members \$40). Item #BLUE-9708

E-Learning Course Formats

Courses are available in an **interactive text format** and **audio/visual format** (expert lecture recording).



1-hour
Interactive Text



2-hour
Interactive Text



3-hour
Interactive Text



4-hour
Interactive Text



1-hour
Audio/Visual

International Foundation Webcasts offer reliable, quality information on the topics you are looking for from leading experts—commercial free—on current issues facing the benefits and compensation industry.

Webcasts are a convenient and affordable resource for training your team, obtaining answers and gaining unbiased solutions to the ever-evolving demands of the industry.

New Webcasts are continually being added—visit www.ifebp.org/webcast to see the current schedule.

We Offer Our Webcasts in Three Ways

1. **Live**—Tune in to listen to the presentation live and have access to the presenter to ask questions you have on the topic being discussed. Topics for these programs are announced via e-mail and on our website. Visit www.ifebp.org/webcast to see the current schedule.

\$195-members

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2. **CD Recordings**—View previously held Webcasts without an Internet connection. Each CD recording contains the original live broadcast as well as a printable version of the presentation materials. CD recordings are typically available ten to 15 business days after the live event.

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\$95-members

\$125-nonmembers



Webcast Recordings or Downloads Available



**Dependent Audits—
Does Health Care Reform Make Them Obsolete or
More Important Than Ever?**



**Health Plan Nondiscrimination Testing
After Health Care Reform**



HIPAA Privacy Rules Refresher



**Information You Need to
Decrease Specialty Drug Costs**



**Long-Awaited Regulations
on Americans with Disabilities Act:
Information You Need to Know**



**Looking Ahead to the Health Care Exchanges:
What You Need to Know Now**



**Medicare:
What's New and What's Changing Next?**

How to Register

Find complete registration information including forms at www.ifebp.org/webcasts.

Phone

(888) 334-3327, option 3

Stay Connected

The International Foundation website is your link to the information you need—you'll find the latest benefits news, clarification on regulatory changes, a bookstore filled with relevant titles, ways to connect with your peers and much more.

Social Media

If you prefer to interact on and get information through Facebook, Twitter, LinkedIn or Youtube, we're there. Connect to the Foundation via these channels to get benefits information in real time.



Benefits Peer Network

Find out how other Foundation members have handled concerns similar to yours through the Benefits Peer Network.

Listserve

You can become actively involved in discussions with your colleagues on a regular basis using e-mail. By joining the listserve, you have a forum for exchanging information with your peers, at the time when the topic is important to you.

Customize Your Communications

We've heard you—you told us you'd like only the messages you need and not the ones you don't. Now you can easily manage your communications from the International

Foundation. A new and improved user profile area of our website allows you to select the messages you'd like to receive, update your contact information, view and print your invoices/receipts, view your educational transcripts, renew your membership and more!

Once you are logged in, click on "My Profile" in the upper right-hand corner to update your information. We thank you for your time.



Mobile Sites

Access conference information for key conferences on your smartphone. We have mobile sites for the U.S. Annual Conference, the Trustees and Administrators Institutes, and the Employee Benefits Symposium. Look for QR codes on brochures to access these mobile sites and you will have the information you need for the conference in the palm of your hand.





Bookstore

Our books cover the entire spectrum of benefits. Industry professionals offer in-depth information on health care, pensions, multiemployer trusts, government benefit programs and more. Get the insight and know-how to succeed.

Bookstore

www.ifebp.org/bookstore

General Benefits

Benefits and Compensation Glossary

12th Edition

A must-have tool for benefits professionals! The glossary contains more than 2,500 definitions plus a list of nearly 1,000 acronyms and abbreviations commonly used in the benefits field. User-friendly explanations are free of jargon, and helpful examples are drawn from legislation and everyday benefits situations. (International Foundation)

206 pages. 2010. Item #6634. www.ifebp.org/books.asp?6634
\$54 (I.F. Members \$39).

Available in print and e-book. Quantity discounts available.



Employee Benefits Survey: U.S. and Canada 2011

Results of the third comprehensive benchmarking survey conducted by the International Foundation. Data on pension and retirement plans, health care and other benefits are provided by corporations, professional service firms, public employers and multiemployer benefit plans in the United States and Canada. Other benefits covered in the survey include life insurance, survivor benefits, voluntary benefits, paid holidays, vacation and paid-time-off banks, disability benefits, paid and unpaid leaves of absence, work/life benefits, financial and retirement planning, and executive perquisites. (International Foundation)

100 pages. 2011. Item #6924. www.ifebp.org/books.asp?6924
\$89 (I.F. Members \$60).

Available in print and e-book.



2011 U.S. Master Employee Benefits Guide

Kathleen Kennedy-Luczak, Melanie King,
Linda Panszczyk, Carol Potaczek and Tulay Turan

A practical reference guide for professionals involved with health, welfare and fringe benefit programs. Besides discussing pertinent federal tax and employment laws, this guide offers helpful insight into the issues that confront human resources and benefits personnel on a daily basis. (CCH Inc.)

878 pages. 2011. Item #8878. www.ifebp.org/books.asp?8878
\$102.50 (I.F. Members \$97.50).



Employee Benefits Answer Book

Tenth Edition

Dorinda D. DeScherer and Terence M. Myers

Comprehensive guidance—including provisions of the health care reform law—for those participating in the design and administration of employee health and welfare benefit plans. More than 1,000 questions and answers cover regulatory compliance and other benefit issues. (Aspen Publishers)

1,368 pages. 2010. Item #8843. www.ifebp.org/books.asp?8843
\$295 (I.F. Members \$285).



2011 Multistate Guide to Benefits Law

John F. Buckley

A popular reference for those who oversee benefits in more than one state. This book covers the broad range of benefits provided by employers and government, including unemployment benefits and workers' compensation. (Aspen Publishers)

1,081 pages. 2011. Item #8861. www.ifebp.org/books.asp?8861
\$339 (I.F. Members \$329).



Health Care/ Health Care Reform

Pharmacy Benefits: Plan Design and Management

F. Randy Vogenberg

A practical guide for benefits professionals and trustees responsible for a prescription pharmacy benefits program. Plan design, the development of a pharmacy network, the selection of a pharmacy benefits manager and compliance are all addressed. Also addressed are cost-saving strategies such as formularies, utilization review and the use of generic medications. (International Foundation)

180 pages. 2011. Item #6962. www.ifebp.org/books.asp?6962
\$46 (I.F. Members \$35).

Available in print and e-book.



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Online at
www.ifebp.org/bookstore

The New Health Care Reform Law: What Employers Need to Know—A Q&A Guide

Second Edition

James R. Napoli and Paul M. Hamburger

Almost everyone has questions about the health care reform law—this guide has the answers. Written in question-and-answer format, this book focuses on information needed to implement reform mandates with complete, to-the-point responses. For example, how to adjust to insurer and plan mandates, requirements for expanding coverage, opportunities for funding health coverage, and reporting and disclosure requirements. A special section titled “Strategic Planning” will help employers plan reform responses and estimate compliance costs. Sample notices, forms and policies will assist in a quick and efficient transition. (AHC Media)

432 pages. 2011. Item #8887. www.ifebp.org/books.asp?8887 \$309 (I.F. Members \$299).



Healthy Employees, Healthy Business: Easy, Affordable Ways to Promote Workplace Wellness

Ilona Bray

Learn how to implement a low-cost employee wellness program and target the major health concerns in your workplace. Drawing on the expertise of doctors, lawyers, benefits specialists, workplace wellness planners and others, this book has the tools to launch and evaluate a program immediately. It also provides ideas for fun, effective activities that can improve employee health, boost morale and lower stress. (Nolo)

327 pages plus CD. 2011. Item #8907. www.ifebp.org/books.asp?8907 \$30.99 (I.F. Members \$29.99).



Employer’s Guide to Health Care Reform

2011 Edition

Brian M. Pinheiro, Jean C. Hemphill, Clifford J. Schoner and Jonathan M. Calpas

In addition to providing an overview of the health care reform law, this book identifies short-, medium- and long-term issues that employers need to address, along with providing commentary on how to respond. It also covers new regulations dealing with grandfathered health plans, age-26-dependent coverage and other recent developments. (Aspen Publishers)

285 pages. 2011. Item #8893. www.ifebp.org/books.asp?8893 \$249 (I.F. Members \$239).



Health Insurance Answer Book

Tenth Edition

John C. Garner

Succinct and authoritative answers to a broad range of health insurance topics: plan design, funding, federal and state regulation, cost management, quality assurance, communication and more. Also addressed are related topics such as dental insurance, vision coverage, mental health treatment, Medicare, and employee assistance and wellness programs. Case law citations and examples are provided in straightforward language that avoids jargon. (Aspen Publishers)

1,216 pages. 2011. Item #8869. www.ifebp.org/books.asp?8869 \$309 (I.F. Members \$299).



HIPAA Privacy for Health Plans After HITECH

A manual to help sponsors of group health plans remain compliant with HIPAA privacy obligations following the passage of HITECH. Supplementing the book are model policies and procedures for maintaining HIPAA compliance, a glossary of key terms and an overview of the Privacy Rule before HITECH that will help provide a context for understanding the updates. A CD with samples of policies and procedures, a breach log, notices and a business associate agreement are also included. (Reinhart Boerner Van Deuren s.c.)

281 pages plus CD. 2009. Item #8822. www.ifebp.org/books.asp?8822 \$129 (I.F. Members \$110).



Wellness Programs: Employer Strategies and ROI

Second Edition

All the steps for developing, implementing and running a wellness program that will help you improve the health of your employees while controlling rising costs. This how-to manual provides strategies and model policies, along with a wealth of practical examples and methods from employers of all sizes and industries. Also included are relevant excerpts of federal laws and regulations, and more than 100 pages of sample policies and documents. (Thompson Publishing)

442 pages. 2011. Item #8886. www.ifebp.org/books.asp?8886 \$309 (I.F. Members \$299).



Bookstore

www.ifebp.org/bookstore

Health Care/ Health Care Reform

Zero Trends: Health as a Serious Economic Strategy

Dee W. Edington

A road map for health promotion programs that can help reverse the trends of escalating health care costs and reduced productivity. The author looks at the objectives of company-sponsored health management programs, their impact on health care costs, and the fundamental requirements for program success. (University of Michigan)

191 pages. 2009. Item #8884. www.ifebp.org/books.asp?8884
\$20.95 (I.F. Members \$19.95).



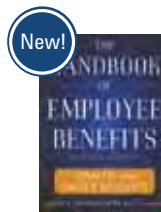
The Handbook of Employee Benefits: Health and Group Benefits

Seventh Edition

Jerry S. Rosenbloom, Editor

A comprehensive book with background information and recommendations on the design and implementation of health and welfare benefits, including life insurance, work/life programs and social insurance. Special chapters on multiemployer plans, international benefit planning and retiree welfare benefits.

1,008 pages. 2011. Item #8915. www.ifebp.org/books.asp?8915
\$135 (I.F. Members \$135).



Multiemployer

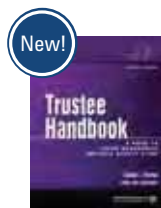
Trustee Handbook: A Guide to Labor-Management Employee Benefit Plans

Seventh Edition

Claude L. Kordus, Editor

Completely revised, this is a must-have book for new and experienced trustees as well as professionals affiliated with multiemployer funds. The best-selling handbook has long been regarded as an essential reference on fiduciary duties and investment responsibilities. (International Foundation)

2012. Item #7068. www.ifebp.org/books.asp?7068
\$87 (I.F. Members \$65).
Quantity discounts available.



Multiemployer Plans: A Guide for New Trustees

Second Edition

Joseph A. Brislin

Every new trustee should have a copy of this book. The author—attorney and trustee to several multiemployer funds—offers an overview of multiemployer plans and explains the important role of trustees in plan management. The book reviews the fiduciary duties and responsibilities assumed by a new trustee; explains many of the terms, laws and documents that a trustee is expected to understand; and offers other practical advice. (International Foundation)

123 pages. 2010. Item #6733. www.ifebp.org/books.asp?6733
\$39 (I.F. Members \$29).
Quantity discounts available.



Collecting Employer Contributions: The ERISA Litigation Guide

Travis J. Ketterman

A guide to the legal actions that multiemployer trust fund representatives must take in the pursuit of payroll information and delinquent contributions. Written with minimal legal jargon, trustees as well as attorneys will find this a valuable resource. The appendix contains nearly 200 pages of sample legal forms and other documents common to the collection process. (International Foundation)

306 pages. 2009. Item #6474. www.ifebp.org/books.asp?6474
\$46 (I.F. Members \$35).
Available in print and e-book.



Payroll Auditing: A Guide for Multiemployer Plans

Lawrence R. Beebe and Philip Vivirito

A step-by-step guide to the payroll audit process for multiemployer plans. This book focuses on efficiency and effectiveness, with real-life stories to illustrate key points. Also included is a collection of letters, checklists and other forms that can be adapted for an audit. (International Foundation)

132 pages. 2008. Item #6436. www.ifebp.org/books.asp?6436
\$46 (I.F. Members \$35).
Available in print and e-book.



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Retirement and Pensions

2011 U.S. Master Pension Guide

Nicholas Kaster, Kathleen Kennedy-Luczak, Kerry McInerney, Linda Panszczyk, Elizabeth Pope, John Strzelecki and Glenn Sulzer

Everything a person needs to know about defined contribution and defined benefit pension plans.

Major topics include funding, participation and coverage, vesting, distribution rules, reporting and disclosure, and special rules for 401(k)s, ESOPs, TSAs and IRAs. This book also includes a plan reporting calendar and quick reference card for easy access to retirement facts and compliance information. (CCH Inc.)

1,170 pages. 2011. Item #8882. www.ifebp.org/books.asp?8882
\$93.95 (I.F. Members \$89.95).



Ready or Not

38th Edition

Elizabeth McFadden

An award-winning, user-friendly workbook emphasizing how to prepare for a fulfilling and enjoyable retirement. Besides encouraging you to save, the book helps readers make the sometimes difficult and confusing choices concerning when, where and how to retire.

Topics include what to expect in retirement, new career options, managing time, putting legal affairs in order, and more.

(MEI Publishing Inc.)

123 pages. 2011. Item #8881. www.ifebp.org/books.asp?8881
\$15 (I.F. Members \$14).

Quantity discounts available.



Quick Reference to ERISA Compliance

2011 Edition

Frank J. Bitzner

This one-volume reference details the reporting and disclosure requirements under ERISA and other benefits legislation. Flow charts and tables will help you quickly determine what is needed to comply with ERISA and its related requirements. (Aspen Publishers)

471 pages. 2011. Item #8871. www.ifebp.org/books.asp?8871
\$309 (I.F. Members \$299).



401(k) Answer Book

2012 Edition

Steven J. Franz, Lisa R. Richardson, Joan C. McDonagh and Marilyn R. Collister

A comprehensive one-volume desk reference in question-and-answer format for benefits professionals who work with 401(k) plans. Legal citations are provided along with sample fiduciary documents and notices, indexed contribution limits and a glossary of terms. For plan participants, there are ten questions that can be used to determine risk tolerance and a three-minute planner that provides a ballpark estimate of financial need upon retirement. (Aspen Publishers)

2012. Item #8913. www.ifebp.org/books.asp?8913
\$309 (I.F. Members \$299).



403(b) Answer Book

Eighth Edition

Donald R. Levy, Barbara N. Seymon-Hirsch and Janet M. Anderson-Briggs

This book systematically answers hundreds of questions regarding 403(b) plans and will guide practitioners through the complexities of establishing and administering such plans. Citations are provided for those who wish to pursue particular items in greater detail. (Aspen Publishers)

2011. Item #8905. www.ifebp.org/books.asp?8905
\$309 (I.F. Members \$299).



Your Pension and Your Spouse— The Joint and Survivor Dilemma

Sixth Edition

R. George Martorana

A workbook for employees that provides step-by-step guidance for deciding between a regular pension and a joint and survivor pension. Income and expense worksheets will help readers evaluate how much money is needed for retirement. Tables on life expectancy and the lump-sum values of a regular pension are handy tools that will also help with the decision-making process. (International Foundation)

24 pages. 2007. Item #6238. www.ifebp.org/books.asp?6238
\$16 (I.F. Members \$12).

Quantity discounts available.



Membership Resources

With more than 50 years of experience and over 34,000 current members, the International Foundation stands out as the industry source for benefits and compensation professionals who take pride in their expertise. As a member, you'll have access to a number of tools to keep you up to date in the benefits industry. To learn more, visit www.ifebp.org/memberkit.

Magazines

The International Foundation's magazines provide you with the information on trends and issues you need to know.



- **Benefits Magazine** delivers practical information and insight from experienced professionals monthly. The *Legal & Legislative Reporter* is included inside.
- **Benefits Quarterly** offers coverage of current trends in benefits and compensation. Corporate members receive this piece.



Research Tools

Get the facts without the investment of your time. Membership means having the research resources you need right at your fingertips.

- With the **Information Center**, you can put our information specialists to work on YOUR project! With access to our extensive benefits library, our specialists are your link to the information you need.
- **Industry Surveys**, conducted regularly, allow you to find out about the latest trends and how your colleagues are reacting to them.



Online Resources

The information you need, when you need it, from a source you can trust.

- **Today's Headlines** delivers alerts and benefits-related news to your inbox each weekday.
- **Special Benefits Alerts** are sent when industry-shaking events occur and include need-to-know news and information.
- **InfoQuick** provides detailed information on over 100 benefits topics instantaneously.
- **U.S. Legislative Tracker** lists proposed and enacted federal bills related to benefits.
- **Live-Streamed Sessions** allow you to watch sessions of selected conferences wherever you are.
- **Sample Documents** give you a starting point. View sample policies, job descriptions, forms, checklists and other documents that have been shared by members of the International Foundation.



Networking

Connect to your peers in the benefits field to share ideas and solutions.

- **Benefits Peer Network** connects members with other members who have volunteered to discuss specific issues.
- **Listserves** provide a community forum to post benefits questions and interact with other members.
- **Resumé Posting** provides an area for posting and viewing resumé for positions in benefits, compensation, HR and HRIS.



Membership Resources

Trustee Resource Center

www.ifebp.org/trusteeresource

Becoming a trustee of a U.S. multiemployer fund is an important honor that carries tremendous responsibility. The International Foundation's Trustee Resource Center is your source for learning more about the myriad aspects of trusteeship and finding resources that will enable you to pursue the best interests of the participants and beneficiaries in your plan.

Topics Include

- Introduction to trusteeship
- Fiduciary responsibilities
- Professional advisors
- Trustee meetings and expenses
- Glossary of terms
- Additional resources and more!

The Trustee Resource Center is available exclusively to members of the International Foundation.

Not yet a member? Find out more and join today at www.ifebp.org/memberkit.

Health Care Reform Central

www.ifebp.org/healthcarereform

Find relevant analyses, daily news updates and regularly updated resources about the health care law and the changes taking place.

Topics include

- Health plan design provisions
- Reporting and disclosure
- Excise taxes and tax credits
- Retiree health care and long-term care insurance
- Insurance marketplace and exchanges.



Member Educational Discounts

Members save an average of 25%—Discounts vary from \$60 to \$260 per program registration.

Discounted Member Services

- **Educational Programs**—Members save an average of 25%—discounts vary from \$60 to \$260 per program registration.
- **CEBS Professional Designations**—Members save \$20 on each CEBS exam fee.
- **E-Learning Courses**—Members save \$10 per course hour.
- **Webcasts**—Members save \$60 per Webcast.
- **Books**—Members save an average of 25% on books and e-books.
- **Research Reports**—Most are free to members.
- **EMPLOYEE BENEFITS INFOSOURCE™**—Members save an average of \$14 per article requested through the Document Delivery Service.
- **Job Posting Service**—Members save \$70 per job posted and post resumé for free.

Pension Reform Central

www.ifebp.org/pensionreform

Plan sponsors in the United States are facing several initiatives to reform defined benefit and defined contribution pension plans to improve retirement income adequacy. Find the information you need to stay on top of the latest issues and developments.

Topics include

- Defined benefit plan funding reform
- Retirement security and lifetime income
- Transparency and fee disclosure.



Sponsorships/Exhibits

2012 Sponsorship Opportunities

Reach those responsible for benefits in a variety of sectors, including single employer plans, multiemployer plan trustees, administrators and public plan representatives. Sponsorship opportunities are available at a variety of programs, allowing sponsors to target specific audiences, or broaden their impact by cross marketing to several sectors in the benefits arena.

Who Should Consider a Sponsorship?

- Consulting firms
- Insurance companies/brokers
- Investment firms
- Pharmaceutical companies
- HMOs and PPOs
- Banks and trust companies
- Publishers
- Software providers
- Utilization review/ cost-containment organizations
- Preretirement services
- Communications services
- Accountants/ CPA firms
- Law firms

Sponsorships Present the Perfect Opportunity to

- Significantly impact a hard-to-reach market
- Enhance an organization's image
- Generate brand recognition
- Build and solidify client relationships within the International Foundation's sponsorship program.

Conferences Offering Sponsorship Opportunities for 2012

- Trustees and Administrators Institutes
- Health Care Management Conference (tabletops allowed)
- Investments Institute
- 58th Annual Employee Benefits Conference
- 31st Annual ISCEBS Employee Benefits Symposium

For more information on sponsorships, please contact Ronaelle Carlson at (262) 373-7748 or ronaellec@ifebp.org, or Pam Wu at (262) 373-7752 or pamw@ifebp.org.

2012 Exhibit Opportunities

Does your organization provide services to multiemployer and/or public employee benefit plans? Exhibiting at select International Foundation conferences is an unmatched opportunity to present your products/services to this hard-to-reach market.

Conferences offering exhibit opportunities this year:

- 58th Annual Employee Benefits Conference
- Trustees and Administrators Institutes

For more information on exhibits, contact Sandra Lange at (262) 373-7657 or sandral@ifebp.org.



Continuing Education

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

Attorneys

For seminars and conferences, continuing legal education (CLE) can be earned in all states that require CLE if the session is legal in content and substantial handouts are distributed at the session. Credit for self-study courses is subject to individual state board regulations.

Certified Financial Planners

The International Foundation is a registered CE sponsor with the CFP® Board. CFP® designees are responsible for determining whether a program is appropriate and qualifies for continuing education (CE) credit. The International Foundation voluntarily submits its Annual Employee Benefits Conference for approval and distributes at that program a list of sessions preapproved for credit. For all other programs, the CFP® must determine qualification of the course to the CFP® accepted subject topics.

Certified Public Accountants

The International Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of group-live continuing professional education (CPE) on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Whether credit can be earned for self-study courses would be subject to the individual state boards of accountancy regulations.

Enrolled Actuaries

The International Foundation is an accepted sponsor under Section 20, CFR Part 901(g)(2)(iii) of the final Rules and Regulations governing those enrolled to perform actuarial services under ERISA. It is the actuary's responsibility to identify core and noncore credit hours. The final decision as to applicable credit rests with the Joint Board for the Enrollment of Actuaries.

For more information, contact the International Foundation's Continuing Education Department.

Phone: (262) 786-6710, option 2

E-mail: continuinged@ifebp.org

Website: www.ifebp.org/education/continuinged

Insurance Producers

The International Foundation seeks approval of seminars and conferences from state insurance departments based on requests for CE credit on program registration forms. Approval of all programs is not automatically sought in all states. All state insurance departments require preapproval of programs for insurance CE credit. Most of the states require receipt of an approval request at least 60 days in advance of the program. It is important that insurance producers requesting CE credit register far enough in advance of the program so that the requirement for advance approval can be met. The International Foundation's self-study courses, including e-learning and CEBS courses, have been preapproved by the majority of state insurance departments. In most cases, the International Foundation reports CE credit completion directly to the state insurance department.

Credit Hours

Credit hours and filing procedures vary by discipline and from state to state. Please visit our website at www.ifebp.org or contact the International Foundation CE staff for more information at (262) 786-6710, option 2; or continuinged@ifebp.org.

College Credit Recommendations for International Foundation Courses

The American Council on Education's College Credit Recommendation Service (ACE CREDIT) has evaluated and recommended college credit for several of the International Foundation's courses. The American Council on Education, the major coordinating body for all of the nation's higher education institutions, seeks to provide leadership and a unifying voice on key higher education issues and to influence public policy through advocacy, research and program initiatives. For more information, visit the ACE CREDIT website at www.acenet.edu/acecredit.

PFR, SPHR, GPHR

The International Foundation seeks approval of e-learning courses and educational conferences for recertification credit hours toward PHR®, SPHR® and GPHR® through the Human Resource Certification Institute (HRCI).

For HRCI inquiries, please contact the International Foundation's Continuing Education Department at (262) 786-6710, option 2, or continuinged@ifebp.org.



The use of this seal is not an endorsement by HRCI of the quality of the program. It means that this program has met HRCI's criteria to be preapproved for recertification credit.

Registration Policies

Registration Policies

- See complete registration/cancellation/refund/record retention/photo release and privacy policies at www.ifebp.org/policies.
- Specific policies as they relate to educational programs are listed below.
- Late fee is charged for registrations submitted within 45 days of a meeting.
- Payment of registration fee (and \$350 hotel deposit if applicable) is due in full upon registration.
- Registration with credit card payment may be faxed to (262) 364-1818 or can be submitted online.
- All payments are due prior to attending class or upon check-in at registration.
- Payment accepted in U.S. funds by check, money order or credit card (VISA, MasterCard and Discover) (American Express accepted for U.S. payments only).
- Registration with check payment—Mail U.S. payments to:

International Foundation
P.O. Box 689954
Chicago, IL 60695-9954

- Cancellation/transfer requests must be in writing and are subject to a fee of \$50 per meeting day for cancellations and \$50 per program for transfers.
- Administrative fee for cancellation received within 30 days of a meeting is 50% of the registration fee.
- Cancellations received on or after the opening day of a program are subject to forfeiture of all registration fees.
- For educational transcript request form, visit www.ifebp.org/aboutus/policies/recordretention.
- For CEBS registration, visit www.ifebp.org/cebs.
- For e-learning registration, visit www.ifebp.org/elearning.

Share What You Know. Get Involved.

Have you ever thought about lending your unique expertise to help your peers? Find out how you can be more involved with the International Foundation.

Visit with International Foundation leaders and explore how your contributions can help. Learn how you can be considered for

- Moderating or leading a roundtable discussion
- Speaking or instructing at a Foundation educational program or Webcast
- Writing an article for *Benefits Magazine*
- Authoring a book on your subject matter expertise
- Serving as a member of a Foundation committee or expert panel
- Helping your peers one on one
- Becoming an industry leader.

Find out more at www.ifebp.org/getinvolved.

Green Initiatives

In an effort to reduce our carbon footprint and in response to feedback from members and conference attendees, the International Foundation continues to search for ways to hold environmentally sensitive meetings.

As part of its strategy, the Foundation has undertaken a number of initiatives that go beyond normal recycling to include both environmentally and socially responsible events, including

- Distributing flash drives and/or posting program content online
- Creating on-site mobile applications that include program schedules, maps and other resources
- Expanding offerings of Webcasts, e-learning, virtual conferences and other computer-based educational programs
- Selecting lodging properties within walking distance
- Offering remaining conference materials to charitable organizations
- Contracting with conference facilities that share our commitment to environmentally responsible practices.

The Foundation will continue to create and expand these green initiatives while maintaining the quality that attendees have come to expect from its offerings.

Find out more at www.ifebp.org/greenmeetings.

REGISTRATION/2012

U.S. Educational Programs

CUSTOMER INFORMATION (Please print clearly)

Priority code 2CATUSW Individual ID# or CEBS® ID# _____
 First name _____ M.I. _____ Last name _____
 Employer _____
 Title _____
 Address _____ Business Home
 City _____ State/Province _____ Country _____ ZIP/Postal code _____
 Phone _____ Fax _____
 E-mail _____
 Last 4/3 digits of SSN/SIN _____ Date of birth (mm/dd/yyyy) _____
See policies regarding registration/cancellation/refund/record retention/photo release and privacy at www.ifebp.org/policies.

NOT A MEMBER? JOIN NOW AND SAVE!

Individual \$295* Organizational \$755* Join now and pay the lower member rate.
 *Membership dues are reduced quarterly. Visit www.ifebp.org/join for current rates.

REGISTRATION INFORMATION

Organization representing _____ Special assistance?
 Organization # _____ Yes No
 Badge name _____ Badge title _____
 Special dietary requirements—specify _____
 Form completed by _____ Phone _____

Meeting Name	Dates	Mtg. #	Fees Enclosed

2012 CANCEL POLICY: Early cancel fee is \$50/meeting day. Within 30 days of meeting, cancel fee is 50% of registration fee.

HOTEL

Include \$350 hotel deposit (if applicable) Smoke free?
 # of Adults _____ # of Children _____ King bed Two beds Yes No
 Arrival date _____ Departure date _____ Special requests—describe _____

CONTINUING EDUCATION CREDIT


\$25 continuing education service charge due at time of registration (if applicable). The International Foundation will apply for CE credit based on requests. You must indicate the profession for which credit is requested.
 Actuary Attorney CPA Insurance producer* Other, specify _____
 Licensed in the state of _____
 License/NPN/BAR/CPA # _____
 *Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Late requests could preclude insurance producers from earning credit.


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Full payment in U.S. funds must accompany order.
 Make check payable to International Foundation.
 Check # _____ \$ _____
 VISA MasterCard Discover
 American Express (U.S. only)
 Credit card # _____
 Exp. date _____
 Cardholder's name (print) _____


REGISTRATION/ORDER SUMMARY

Membership fee \$ _____
 Registration fee \$ _____
 Registration fee \$ _____
 Registration fee \$ _____
 Hotel deposit (\$350) \$ _____
 Continuing education fee (\$25) \$ _____
Total (U.S. funds) \$ _____

 Register online at www.ifebp.org

 Mail the registration form with check or credit card number to:
 International Foundation—Conference,
 P.O. Box 689954, Chicago, IL 60695-9954

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 For information, e-mail edreg@ifebp.org, or phone toll free
 (888) 334-3327, option 2, or (262) 786-6710, option 2

Choosing the Right Programs for You

With over 55 face-to-face conferences and training programs offered each year, over 60 e-learning courses, certification and certificate programs and more, choosing the right program can be a daunting task.

We have developed suggested educational paths to help guide you. These paths provide an overview of educational options for varying roles so you can select the appropriate programs to help you meet your specific goals.

Specific Educational Paths Available Include

CORP

Corporate/Single Employer—provides a summary of educational options that suit those who work with corporate benefit plans, based on area of focus.

ME

Multiemployer—provides a road map for new and seasoned trustees for selecting appropriate programs based on their length of service and interests.

PE

Public Sector—helps new and experienced public trustees and staff to select suitable programs based on years of experience and area of focus.

Access all versions of the educational paths at www.ifebp.org/educationpath.

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