

2026

Trustee Education Schedule



www.ifebp.org/cdtrusteepath

May 4-7, 2026

Marriott Downtown Eaton Centre
Toronto, Ontario
FTMS, ATMS and MTMS only

August 28-30, 2026

Halifax Convention Centre
Halifax, Nova Scotia
(held in conjunction with the 59th Annual Canadian Employee Benefits Conference)

November 7-8, 2026

The Royal at Atlantis Paradise Island
Nassau, The Bahamas
ATMS only
(held in conjunction with the Canadian Investment Institute)

FTMS[®], ATMS[®] and MTMS[®]— Your Path for Trustee Education

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

In addition, *Principes fondamentaux de gestion fiducies* is a two-day certification program that provides the same comprehensive, foundational trustee education as FTMS. This program helps participants understand the health and retirement needs of plan members while deepening their knowledge of the key aspects of effective trust management, all delivered entirely in French.

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

Who Should Attend

These programs are for multi-employer, public sector and corporate plan trustees/fiduciaries as well as benefit office staff who serve on any of the following plans:

- Defined benefit (DB) plans
- Defined contribution (DC) plans
- Target benefit plans (TBPs)
- Health and welfare plans
- Employee life and health trusts (ELHTs).



Trustee Education Made Easy

Learn from industry experts while collaborating with fellow trustees in a hands-on, engaging environment. Explore real-life case studies, participate in dynamic discussions and walk away with actionable strategies to strengthen your fund management. Plus, the open-book online exam gives you 60 days to review and succeed—no surprises here! Over 90% of participants pass on their first try.



Register online at www.ifebp.org/cdtrusteepath | Questions? Call (833) 886-3749.



FOUNDATIONS OF TRUST MANAGEMENT STANDARDS®

www.ifebp.org/ftms



Are you a new trustee looking to get up to speed on the basics of trust management? Attend the Foundations of Trust Management Standards (FTMS) program and get the knowledge you need to help ensure your plan's success.

FTMS is the first step on the trustee education path, focused on the needs of new Canadian multi-employer, public and corporate sector plan trustees.

FTMS will help you understand the health and retirement needs of plan members while increasing your knowledge and awareness in the key areas of effective trust management: legal and regulatory issues, administration, governance and funding/investment/finance.

In this two-day program, you will have an opportunity to network and share experiences with other new trustees while gaining the need-to-know skills to succeed in your role.

Earn Your FTMS From Your Location on Your Schedule.
Enroll in FTMS Virtual. Learn more: www.ifebp.org/ftmsvirtual

Principes fondamentaux de gestion des fiducies

fr.ifebp.ca/fiduciaire

Nouveau dans votre rôle de fiduciaire? Prenez un bon départ avec le programme Principes fondamentaux de gestion des fiducies.

Conçu pour les nouveaux fiduciaires des régimes interentreprises, publics ou privés, ce programme vous donnera les bases essentielles pour bien comprendre votre rôle et contribuer au succès de votre régime.

En deux jours, vous explorerez les grands enjeux de la gestion des fiducies - gouvernance, administration, aspects juridiques, financement, placements - et découvrirez les besoins réels des participants en matière de santé et de retraite. Le tout, dans un cadre qui favorise les échanges et le partage d'expériences avec d'autres fiduciaires.

Pour obtenir votre certificat de réussite, vous devez :

- Participer à la formation de deux jours
- Réussir l'examen en ligne avec une note de 70 % ou plus



28 et 29 août 2026

**Centre des congrès d'Halifax
Halifax, Nouvelle-Écosse**

(précédant la 59e conférence annuelle canadienne sur les avantages sociaux)

ATMS

ADVANCED TRUST MANAGEMENT STANDARDS®

www.ifebp.org/atms

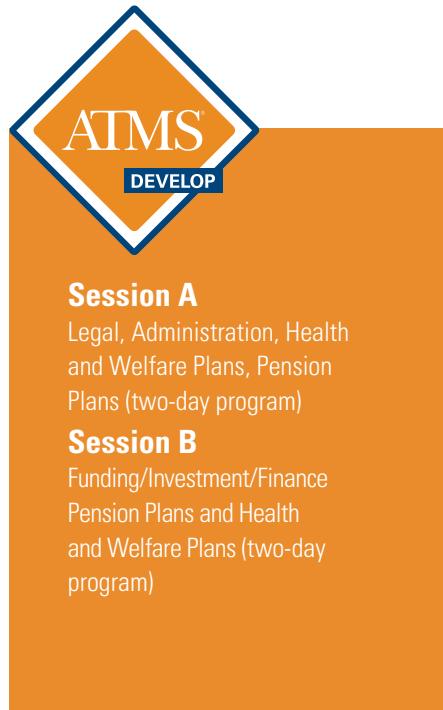
Designed for the needs of experienced trustees, Advanced Trust Management Standards (ATMS) will give you the tools you need not only to be successful in your role as a trustee but also to look toward the future and prepare your plan for the challenges ahead.

For trustees who have either completed the FTMS Certificate of Achievement or passed the ATMS Qualifying Test, this is the perfect opportunity to continue your trustee training. Trustees will learn about more detailed applications, including case studies on pension and health and welfare plans. You will feel more competent and confident in your role as you look toward making strategic decisions for the future.

Who Should Attend

This course is recommended for advanced-level appointed and elected multi-employer, public sector and corporate plan trustees/fiduciaries of any type of trust; members of pension advisory or benefit committees; and benefit office staff.

If you are an experienced trustee looking to enroll in ATMS but have not taken FTMS, you can gain direct entry to ATMS via the ATMS Qualifying Test. Learn more at www.ifebp.org/atms-test.



Session A

Legal, Administration, Health and Welfare Plans, Pension Plans (two-day program)

Session B

Funding/Investment/Finance Pension Plans and Health and Welfare Plans (two-day program)

MTMS

MASTER OF TRUST MANAGEMENT STANDARDS

www.ifebp.org/mtms

For those who have completed both FTMS and ATMS, Master of Trust Management Standards (MTMS) is for leaders who are ready to leverage their own unique leadership strengths and skills to optimize their contribution.

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

This program is highly interactive, focusing on the evaluation and creation of new points of view and on behavioural change in the areas of leadership, governance, oversight, strategic planning and risk management. The program includes capstone mock board meetings so you can apply what you've learned.

This program is the culmination of your Canadian trustee education path! Once you have met your MTMS requirements, you can proudly display your MTMS credential, confirming your expertise in Canadian trustee management.



MTMS

ADVANCED LEADERSHIP SUMMIT

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

This half-day workshop will provide practical tips and skills that trustees need in order to develop working relationships that operate with minimal conflict and a high level of trust and confidence. The topic focus of the MTMS Advanced Leadership Summit changes each year to reflect the most essential issues facing trustees.

Visit www.ifebp.org/mtmssummit for more details and updates.



August 30, 2026

8:00 a.m.-12:00 noon

Halifax Convention Centre

Halifax, Nova Scotia

(held in conjunction with the 59th Annual Canadian Employee Benefits Conference)

Earning Your Certificate of Achievement or Credential



To earn your FTMS Certificate of Achievement, you need to:

- Attend the two-day course or the online training
- Complete the FTMS online exam with a score of 70% or higher.



To earn the ATMS Certificate of Achievement, you need to:

- Have completed the FTMS Certificate of Achievement or passed the ATMS Qualifying Test
- Attend Sessions A and B
- Complete both online exams with a score of 70% or higher.



To earn the MTMS credential, you need to:

- Have completed the ATMS Certificate of Achievement
- Attend Sessions A and B, with relevant prework
- Complete both online exams with a score of 70% or higher.

The open-book, multiple-choice exam gives you time to review your notes and find the correct answers.

Don't be intimidated—Over 90% of attendees pass on their first attempt!

59TH ANNUAL CANADIAN EMPLOYEE BENEFITS CONFERENCE

August 30-September 2, 2026

Halifax Convention Centre
Halifax, Nova Scotia

Register today at www.ifebp.org/canannual26

For nearly 60 years, the Annual Canadian Employee Benefits Conference has been the premier source of comprehensive education for pension and benefit professionals. We are thrilled to be in Halifax and have you join us to learn about upcoming trends, legislative changes and key topics impacting your plan and its members. We are putting the final touches on this year's agenda that will be packed with dynamic sessions. You'll walk away with actionable takeaways to improve your fund's operations.



Canadian Investment Institute

November 9-11, 2026

The Royal at Atlantis Paradise Island
Nassau, The Bahamas

Register today at www.ifebp.org/canadainvest

Developed for multi-employer and public investment plan leaders, the Canadian Investment Institute will equip you to make confident, strategic decisions that protect and grow member benefits over the long term. Join your peers and hear from industry experts on in-depth topics that matter to your funds. If you or your colleagues are responsible for plan investing and strategy, don't miss this conference—it's your chance to sharpen your approach and secure your plan's long-term success.



CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit when you register at least 60 days prior to the beginning of the program so the Foundation can seek preapproval from the governing agency.

Note: Requests made for CE credit do not guarantee administration of credit.

For CE inquiries, please contact the International Foundation Continuing Education Department at (905) 361-2822 or toll-free at (833) 886-3749, or email continuinged@ifebp.org.



CEBS® COMPLIANCE CREDIT

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

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within three days of arrival. Registration fee is forfeited once program commences. Visit www.ifebp.org/policies for details on the current policy.

QUESTIONS?

Visit www.ifebp.org/cdtrusteepath for frequently asked questions about the FTMS, ATMS and MTMS certificate programs, or call (262) 373-7713 for further information.



Trustee Training 2026 Offerings



May 4-7, 2026

Marriott Downtown Eaton Centre
Toronto, Ontario



August 28-30, 2026

Halifax Convention Centre
Halifax, Nova Scotia

*(held in conjunction with the 59th Annual
Canadian Employee Benefits Conference)*



November 7-8, 2026

The Royal at Atlantis Paradise Island
Nassau, The Bahamas

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ATMS
Only

Visit www.ifebp.org/cdtrusteepath to register,
or call (905) 361-2822 or toll-free (833) 886-3749
for more information.

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OF EMPLOYEE BENEFIT PLANS CANADA



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