

# Collection Procedures Institute

**September 29-30, 2025**

Hyatt Regency Monterey Hotel & Spa  
Monterey, California



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

International Foundation  
OF EMPLOYEE BENEFIT PLANS



# Collection Procedures Institute

**September 29-30, 2025** | Hyatt Regency Monterey Hotel & Spa | Monterey, California

Ensuring timely collections is essential to your fund's financial health. This course equips you with the practical knowledge and strategies needed to meet your fiduciary duty in securing employer contributions. In today's unpredictable economy, it is imperative that you keep abreast of emerging trends and best practices. Join expert instructors in Monterey, California as they share the latest legal insights, auditing techniques and fund office procedures that can strengthen your collections program. Walk away with actionable strategies to refine your policies, optimize collections and reduce administrative challenges.

**Register by August 18 to save US\$300.**

## Who Should Attend

This course is designed for anyone affiliated with a multiemployer trust fund who has a role in or responsibility for collecting employer contributions, including:

- Multiemployer trustees
  - Labor and management
  - Pension, welfare and apprenticeship funds
  - Small and large funds
  - All industries
- Administrators
  - Salaried and third-party
  - Administrative staff
- Payroll auditors and collection coordinators
- Certified public accountants
- Attorneys.

## Key Takeaways

- Understand the collections process.
- Learn the roles and responsibilities of your entire collections team.
- Explore effective strategies that yield results.
- Know how key legal decisions may impact your plans.
- Develop a list of best practices to implement.
- Access sample documents, checklists and other prototypes.
- Apply your learning as you participate in case studies.
- Network through interactive sessions, allowing you to learn from your peers.

# SESSIONS AT A GLANCE

MONDAY   September 29, 2025	
8:00-11:30 a.m.	Module I: Team Collections
12:30-4:00 p.m.	Module II: Collections Process and Professionals
TUESDAY   September 30, 2025	
8:00-11:30 a.m.	Module III: Unique Collection Issues
12:30-4:00 p.m.	Module IV: Securing Payment and Wrap-Up

(All times are listed in Pacific Standard Time.)

## FACULTY



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## SUNDAY | September 28, 2025

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5:00-6:00 p.m.

### Registration and Information

(All times are listed in Pacific Standard Time.)

## MONDAY | September 29, 2025

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7:00 a.m.-4:00 p.m.

### Registration and Information

7:00-8:00 a.m.

### Continental Breakfast

8:00-11:30 a.m.

### Module I: Team Collections

This module will lay the foundation for understanding collections, with a focus on the team approach to managing the process. Topics include:

- Fiduciary responsibility
- Collective bargaining agreements and collection procedures
- Administrative processes and best practices
- Delinquency committees
- Case study exercise.

## MONDAY | September 29, 2025 *(continued)*

11:30 a.m.-12:30 p.m.

**Lunch** *(provided)*

12:30-4:00 p.m.

### **Module II: Collections Process and Professionals**

This module will focus on the collections process and the professionals who help you manage your collections program.

Topics include:

- Payroll audits
- Lawyers and the litigation process
- Case study exercise.



*Attending the program made me feel more confident. I appreciated seeing other people's approach to the collections process, and it was a nice reminder of the trustees' fiduciary duty to collect.*

## **TUESDAY | September 30, 2025**

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7:00 a.m.-4:00 p.m.

### **Registration and Information**

7:00-8:00 a.m.

### **Continental Breakfast**

8:00-11:30 a.m.

### **Module III: Unique Collection Issues**

This module will address unique collections issues that need special consideration. Topics include:

- Beyond the signatory employer
- Bankruptcy
- Withdrawal liability
- Unique payroll challenges
- Case study exercise.



## **TUESDAY | September 30, 2025** *(continued)*

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11:30 a.m.-12:30 p.m.


**Lunch** *(provided)*

12:30-4:00 p.m.

### **Module IV: Securing Payment and Wrap-Up**

This module will tie together the whole course and hone in on getting the money. Topics include:

- Settlements
- Post-judgment collection actions
- Case study wrap-up exercise
- Open forum.



Visit [www.ifebp.org/collections](http://www.ifebp.org/collections) to register online.

# Hotel Information

## Hyatt Regency Monterey Hotel & Spa

**Rate:** US\$239 single/double occupancy  
(additional US\$25/person per night  
for a third and/or fourth guest)

**Reservation Deadline:**

Tuesday, August 26, 2025

**Resort Fee:**

US \$15/day (reduced from US \$29/day)

**Hotel Accommodations:** Please visit our Hotel/Travel tab at [www.ifebp.org/Collections](http://www.ifebp.org/Collections) to view applicable taxes and fees. For hotel questions, contact the Registration Department at (888) 334-3327, option 2, or [edreg@ifebp.org](mailto:edreg@ifebp.org). You will be charged a US\$400 deposit upon registration. Please specify your hotel requirements on the registration form.

## Hotel Details

Whether you're staying at the resort or are an avid golfer looking for your next round, Hyatt Regency Monterey Hotel & Spa on Del Monte Golf Course is the start of your next adventure. Our hotel is ideally located near Carmel Valley wineries, the iconic Monterey Peninsula, Monterey Bay Aquarium, Monterey County Fairgrounds, and the forests and mountains of nearby state parks. Onsite amenities, including an elite golf course and a full-service hotel spa, fill your day with fun, while cozy accommodations invite relaxation.

**Hotel Cancellation Policy:** Hotel deposit forfeited for reservations cancelled within 72 hours prior to arrival.

*Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

## Location Details

Monterey offers attractions and activities for every visitor. Visit the National Steinbeck Center in Salinas to learn more about the life and times of author John Steinbeck, or make your way through the scenic route of the 17-Mile Drive to Pebble Beach for some golf. Discover your own adventures in scenic Monterey.

## REGISTRATION

Register today at [www.ifebp.org/collections](http://www.ifebp.org/collections).

	Member	Nonmember
Through August 18, 2025	US\$1,460	US\$1,680
After August 18, 2025	US\$1,760	US\$1,980

## REGISTRATION INCLUDES

Continental Breakfasts | Lunches | Beverage Breaks

## 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%. Registration fee is forfeited once program commences. For details and the current policy, see [www.ifebp.org/policies](http://www.ifebp.org/policies).

## INTERNATIONAL FOUNDATION MISSION

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.

## CONTINUING EDUCATION CREDIT

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

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

For further information on CE credit, please call (262) 786-6710, option 2, or email [continuinged@ifebp.org](mailto:continuinged@ifebp.org).



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.



# Collection Procedures Institute

## Session Topics

- Fiduciary responsibility
- Collective bargaining agreements and collection procedures
- Administrative best practices
- Payroll audits
- Judgments
- Beyond the signatory employer
- Bankruptcy
- Withdrawal liability
- Settlements
- Post-judgment collection actions

**Register by August 18, 2025 to save  
US\$300 with the early registration discount!**

**Visit [www.ifebp.org/collections](http://www.ifebp.org/collections)  
for more information and to register.**

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