CONNECT
GLOBAL BENEFITS SUMMIT
May 11-13, 2020 | Chicago, Illinois

NEW SESSIONS ANNOUNCED!

www.ifebp.org/CONNECT
YOU’RE INVITED to attend the newest event for global employee benefits professionals.

Expert-led sessions, comprehensive case studies and a focus on networking make CONNECT Global Benefits Summit a must-attend event for global benefits professionals.

Explore the latest industry trends and best practices of a dynamic global benefits strategy while gaining the unique perspective of elite global professionals.

The inaugural CONNECT Global Benefits Summit will be held May 11-13, 2020 in Chicago, Illinois. The event will kick off Monday evening and run through midday Wednesday—allowing for easy weekday travel to and from the event.

Benefits of Attending

LEARN from industry experts about the latest issues in global benefits management.

NETWORK with an elite group of global benefits professionals—building connections while you learn.

GAIN an insider view of how other organizations have found success through comprehensive case studies and lively roundtable discussions.

WHO SHOULD ATTEND

CONNECT Global Benefits Summit provides advanced-level education for professionals in the global benefits industry. Those who should attend include:

- Human resources, employee benefits and compensation professionals who work for multinational corporations
- Professionals working for global benefits consulting firms
- Individuals who have completed the International Foundation Certificate in Global Benefits Management and are looking for the next step in global benefits education.
## 2020 CONFERENCE SCHEDULE

### Monday, May 11, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>4:00-7:00 p.m.</td>
<td>Registration Open</td>
</tr>
<tr>
<td>4:00-7:00 p.m.</td>
<td>Exhibits Open</td>
</tr>
<tr>
<td>4:30-5:30 p.m.</td>
<td>Keynote: Global Trends Shaping the Future of Work and Skills</td>
</tr>
<tr>
<td>5:30-7:00 p.m.</td>
<td>Reception</td>
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### Tuesday, May 12, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00-9:00 a.m.</td>
<td>Continental Breakfast</td>
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<tr>
<td>8:00 a.m.-5:30 p.m.</td>
<td>Registration and Exhibits Open</td>
</tr>
<tr>
<td>9:00-10:00 a.m.</td>
<td>Managing Global Benefits for an Expanding and Diverse Workforce</td>
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<tr>
<td></td>
<td>Working Effectively with Finance and Accounting Teams</td>
</tr>
<tr>
<td>10:15-11:15 a.m.</td>
<td>Multinational Pooling Governance</td>
</tr>
<tr>
<td>11:30 a.m.-12:30 p.m.</td>
<td>Global Family-Friendly Benefits—A Holistic Approach</td>
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<td>Global Mobility—Insuring the Mobile Employee</td>
</tr>
<tr>
<td>12:30-2:00 p.m.</td>
<td>Luncheon</td>
</tr>
<tr>
<td>2:00-3:00 p.m.</td>
<td>What All Employee Benefits Professionals Should Know About the Changing Landscape of Data Privacy</td>
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<td>Sneak Attack: The Top Global Mobility Employment Issues Organizations Face . . . Or Ignore at Their Peril</td>
</tr>
<tr>
<td>3:15-4:15 p.m.</td>
<td>Developing a Centralized Global Benefits Strategy</td>
</tr>
<tr>
<td>4:15-5:30 p.m.</td>
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### Wednesday, May 13, 2020

<table>
<thead>
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<tr>
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<td>Roundtable Discussion: Latin America</td>
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<td>9:45-10:45 a.m.</td>
<td>Global Benefits Governance and Harmonization During Mergers and Acquisitions</td>
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<td>Roundtable Discussion: Europe</td>
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<tr>
<td>11:00 a.m.-12:00 noon</td>
<td>Challenges and Solutions to Meet Impossible Acquisition Terms From Seller</td>
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<tr>
<td></td>
<td>Roundtable Discussion: Asia Pacific</td>
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CONNECT Global Benefits Summit

MONDAY, MAY 11, 2020

4:00-7:00 p.m.
Registration Open

4:00-7:00 p.m.
Exhibits Open

4:30-5:30 p.m.
**Keynote: Global Trends Shaping the Future of Work and Skills**

The world is in disruption! You are at the forefront of rapid change. The continued accelerated pace of technology and competition is causing workplace environments to become more volatile and in need of disruptive leaders, employees to challenge the status quo and executives to lead the way. This presentation focuses on key trends that impact jobs, new skills that are needed today to remain relevant and what this means for global benefits professionals.

*Speaker:*

**Dr. Tracey Wilen**
Researcher and Speaker
Santa Monica, California

5:30-7:00 p.m.
Reception

TUESDAY, MAY 12, 2020

8:00-9:00 a.m.
Continental Breakfast

8:00 a.m.-5:30 p.m.
Registration and Exhibits Open

9:00-10:00 a.m.  **Concurrent Sessions**

**Managing Global Benefits for an Expanding and Diverse Workforce**

In this session, you will hear how a well-known multinational company approaches its global benefit strategy and oversight to balance the needs of an expanding and diverse workforce. This session will include discussion on best practices, typical roadblocks and lessons learned for topics including governance, global benefits management, risk financing and benefit plans for both local and globally mobile employees.

*Speakers:*

**Muna Almuallem**, Director of International Benefits, Fluor, Lewisville, Texas

**Pamela Enright, GPHR**, Senior Director, Expatriate Benefits Solutions, Global Services and Solutions, Willis Towers Watson, Chicago, Illinois
TUESDAY, MAY 12, 2020 (continued)

9:00-10:00 a.m. (continued)  Concurrent Sessions

**Working Effectively with Finance and Accounting Teams**
This session will focus on managing financial aspects of multinational companies’ benefits programs, and developing attendees’ financial acumen. Topics will include:

- Understanding finance and accounting terminology
- Managing an overall global benefits budget
- Justifying the budget with market data
- Explaining the scope of available funding approaches.

**Speakers:**

Wil Gaitan, ASA, CCP, EA, FCA, MAAA, Global Consulting Actuary, ALTA Actuaries & Consultants, LLC, Chicago, Illinois

Miguel Santos, CCP, GRP, Global Consulting Actuary, ALTA Actuaries & Consultants, LLC, Chicago, Illinois

10:15-11:15 a.m.  Concurrent Sessions

**Multinational Pooling Governance**
Hear how multinational pooling can support global benefits governance across fully centralized to fully decentralized governance models by addressing employee benefits challenges and providing both financial and nonfinancial advantages with oversight. The journey includes starting a program, moving to maturity and trending models such as global pricing and captives.

**Speaker:**

Belinda Harris, CEBS, GPHR, Global Total Rewards Senior Manager, Accenture, Total Rewards Center of Expertise, Chicago, Illinois

**Global Medical Trends**
Join this session for a robust discussion of medical and health trends across the globe. Topics will include:

- Medical inflation and cost drivers
- Lifestyle factors and cultural influences
- Trends in digital health
- Where consumerism is impactful
- How employers and insurers are focusing resources.

**Speakers:**

Rosalba Smajlovic, Multinational Client Consultant, Mercer, Chicago, Illinois

Many Wu, Principal, Multinational Client Group, Global Health, Mercer, Los Angeles, California
11:30 a.m.-12:30 p.m. **Concurrent Sessions**

**Global Family-Friendly Benefits—A Holistic Approach**

Join this session for a discussion of family-friendly benefits as part of a holistic approach to employee well-being. The session will begin with an overview of family-friendly benefits within the context of the dynamics of family life, including medical and maternity leaves of absence, fertility assistance, the right to disconnect, flexible work hours and outlier trends such as maternity milk delivery. The discussion will include trends regarding which regions/countries do and do not have legal/mandatory requirements as well as which typically provide benefits beyond what is required.

*Speakers:*

Nicholas C. Dobelbower, Ph.D., CEBS, Dip.IEB, GPHR, Senior Vice President, Director, Global Benefits Practice, Lockton Companies, Washington, D.C.

Jennifer Johnson, Global Senior Consultant, Lockton Companies, Washington, D.C.

**Global Mobility—Insuring the Mobile Employee**

Attendees will discuss the travel risks employees face and the hidden liabilities a company may be held responsible for. The session will start with a review of the different types of business travel—from business lunches to short-term international travel and long-term assignments (six months or greater)—and the options employers have for insuring their mobile employees. The session will end with a facilitated small-group case study to identify travel perils and a discussion of the best ways to insure these travel risks.

*Speaker:*

Edward B. Gow, GBA, Assistant Vice President, Global Employee Benefits Senior Account Executive, ABD Insurance and Financial Services, Inc., San Mateo, California

12:30-2:00 p.m. **Luncheon**
TUESDAY, MAY 12, 2020 (continued)

2:00-3:00 p.m.  
**Concurrent Sessions**

**What All Employee Benefits Professionals Should Know About the Changing Landscape of Data Privacy**

The European Union’s General Data Protection Regulation (GDPR) took effect in 2018, and it drastically impacted the collection, processing, storage and use of data. Any entity that processes data related to an EU data subject is required to comply with the granular technological, administrative and legal requirements laid out in the GDPR. Soon after, the California Consumer Privacy Act (CCPA) was passed. While colloquially referred to as the “domestic GDPR,” there are notable differences between the CCPA and GDPR. And, while the GDPR and the CCPA have been the noisemakers in the data privacy world, they are far from the only game in town. This presentation will discuss the changes to the data privacy landscape and the global impact of the GDPR, CCPA and other data protection regulations. The discussion will include a brief comparison of the requirements domestically and will focus on the growing divergence in the ways countries and regions approach data privacy and protection—providing insight into global data management within increasingly contrasting international requirements. Finally, this session will provide insight into solutions to address the protection of personal data when operating with a domestic and global workforce.

*Speakers:*

*Jordan L. Fischer, Esq.,* Co-Founder and Managing Partner, XPAN Law Group, LLC, Philadelphia, Pennsylvania
*Rebecca Rakoski, Esq.,* Co-Founder and Managing Partner, XPAN Law Group, LLC, Philadelphia, Pennsylvania

**Sneak Attack: The Top Global Mobility Employment Issues Organizations Face . . . Or Ignore at Their Peril**

Every employee who travels on behalf of a company, is relocated for secondment or is transferred to a new location carries with him/her numerous employee entitlements. While this seems basic, it gets complicated very quickly for employees who cross international borders. They may acquire unexpected rights to leave or protections from termination. They may even acquire rights to foreign severance or other entitlements. Every global mobility professional must be conversant in the employment issues that arise when sending employees across borders. This program will address the most common mobility structures, the most common pitfalls, and some important tips and strategies to avoid liability.

*Speakers:*

*Hinna Upal,* Associate, Littler, Fairport, New York
*Lavanga V. Wijekoon,* Labor and Employment Attorney, Littler, Chicago, Illinois
3:15-4:15 p.m.

**Developing a Centralized Global Benefits Strategy**

This session will explore the fundamental question of what is meant by a centralized global benefits strategy and will discuss the evaluation process of defining it and how to execute it. The exploration of these considerations will be viewed in a case-study approach for several different companies to highlight why there are differences in these strategies across organizations. By the end of the session, participants will understand how to frame their thinking when considering a centralized global benefits strategy for their organizations.

*Speaker:*

**Phillip W. Wismar, CEBS,** Director of Total Rewards, HelloFresh, Los Angeles, California

**Roundtable Discussion: Global Mobility**

Join this session to engage in small-group discussions as a continuation of the last two sessions on global mobility. Attendance is limited—Arrive early to be guaranteed a seat!

*Panelists:*

**Edward B. Gow, GBA,** Assistant Vice President, Global Employee Benefits Senior Account Executive, ABD Insurance and Financial Services, Inc., San Mateo, California

**Hinna Upal,** Associate, Littler, Fairport, New York

**Lavanga V. Wijekoon,** Labor and Employment Attorney, Littler, Chicago, Illinois

4:15-5:30 p.m.

**Reception**
WEDNESDAY, MAY 13, 2020

7:30-8:30 a.m.
Continental Breakfast

7:30-11:00 a.m.
Registration and Exhibits Open

8:30-9:30 a.m. Concurrent Sessions
Global Benefits Challenges in Mergers and Acquisitions: From Start to Finish
Come participate in a deep dive into employee benefits matters in all stages, from pre-due diligence to post-deal execution. This session will focus on both financial and nonfinancial risks and specific country challenges. The presenter will use specific company examples throughout this journey to illustrate key points and highlight best practices for each stage of the deal.

Speaker:
Brian D. Makuck, FSA, EA, FCA, Global Practice Leader, International Consulting, Buck, Atlanta, Georgia

Roundtable Discussion: Latin America
Join this session to engage in small-group discussions regarding employee benefits in Latin America. Attendance is limited—Arrive early to be guaranteed a seat!

9:45-10:45 a.m. Concurrent Sessions
Global Benefits Governance and Harmonization During Mergers and Acquisitions
Join this session for a discussion on how to successfully set up a global governance framework that will provide a systematic and supportive approach to managing benefits and the harmonization process during merger and acquisition (M&A) situations. The session will start by exploring and sharing research on what defines best practice governance to understand how companies can set up a governance framework that will allow them to execute the process successfully. Next, hear ideas on how employers can take initiative through a deep dive into The Sherwin-Williams Company (Sherwin-Williams) approach—an approach that helps companies support their businesses while keeping costs contained. The session will conclude with a Q&A session and a sharing of practical ideas and considerations.

Speakers:
Matthew G. Flynn, Senior Analyst—Employee Benefits, The Sherwin-Williams Co., Cleveland, Ohio
Vaibhavi Patel, FSA, EA, Senior Vice President, Aon, Chicago, Illinois
9:45-10:45 a.m.  Concurrent Sessions

Roundtable Discussion: Europe
Join this session to engage in small-group discussions regarding employee benefits in Europe. Attendance is limited—Arrive early to be guaranteed a seat!

11:00 a.m.-12:00 noon  Concurrent Sessions

Challenges and Solutions to Meet Impossible Acquisition Terms From Seller
When a major computer hardware company (over 80,000 employees globally) sold its software business (3,500 employees in 45 countries outside the U.S.), the agreement called for the purchaser to replicate existing benefits and employment practices globally. The purchaser (a private equity firm) wanted their obligations met while ensuring a successful close within three months. Furthermore, the seller would only release limited data on the employees moving with the transaction. Join this session to hear about how the stakeholders found solutions to their challenges.

Speakers:
Lisa Mohr, Area Vice President, Arthur J. Gallagher, Chicago, Illinois
Albert Phelps, CEBS, CEBS Compliant, Area Vice President, Arthur J. Gallagher, Chicago, Illinois

Roundtable Discussion: Asia Pacific
Join this session to engage in small-group discussions regarding employee benefits in the Asia Pacific region. Attendance is limited—Arrive early to be guaranteed a seat!
Global Benefits Education and Networking

Stay informed on the issues and best practices that will shape your global benefits strategy.

Certificate in Global Benefits Management
October 5-9, 2020 in Boston, Massachusetts
Gain the comprehensive knowledge needed to administer and manage a global benefits program. The robust curriculum provides a foundation in international benefits and an enhanced understanding of the benefits offered around the world.

Certificate in Canadian Benefit Plans
June 8-10, 2020 in Boston, Massachusetts
This certificate offers a solid introduction to Canadian employee benefits, pensions and human resource practices. Attendees who work in or have affiliates in Canada will gain practical and useful information about the Canadian pensions and benefits landscape.

CONNECT Global Benefits Summit
Save the Date!
May 24-26, 2021 in Boston, Massachusetts
Expert-led sessions, comprehensive case studies and a focus on networking, make CONNECT a must-attend event for experienced global benefits professionals. The conference covers the latest industry trends and best practices for building a dynamic global benefits strategy.

Foundation Global Benefits Community
Connect, share and learn from other global benefits professionals in the Foundation’s Global Benefits Community. This private discussion group allows you to ask questions of your peers who have faced similar challenges unique to the world of global employee benefits.

LEARN MORE AT WWW.IFEBP.ORG/GLOBAL.

Conference Advisory Committee

Mauro Canori
Celgene Corporation

Christy Kim
Epic Games, Inc.

Paula Krupa, CEBS
Roper Technologies, Inc.

Sean T. O’Donnell, CEBS
Ernst & Young

Rebekah Ross, GBA
MoneyGram International, Inc.

April Rowe
ABD Insurance & Financial Services, Inc.

Todd Solomon
McCermott Will & Emery LLP

Mary Takagi, CEBS
Sun Chemical Corporation

May 11-13, 2020 | Chicago, Illinois
Exhibit Opportunities

**GROW BRAND AWARENESS** and secure valuable leads by exhibiting at or sponsoring CONNECT Global Benefits Summit.

Global benefits is a specialized market, and CONNECT attendees will be seeking products and services for their international organizations.

**Who Should Exhibit or Sponsor?**

- Benefits consulting
- Health insurance
- Multinational pooling
- Wellness solutions
- Employee assistance programs
- Retirement solutions
- Investment/financial services
- Legal services

**EXHIBIT OPPORTUNITIES**

**Tabletop Exhibit Displays Include:**

- One all-access conference registration including sessions, receptions, continental breakfasts and luncheon (Value $1,195)
- One exhibitor assistant/exhibit-hall-only registration including receptions, continental breakfasts and luncheon (Value $500)
- 6’ table and two (2) chairs
- Free Wi-Fi
- Wastebaskets
- Exhibit hall is carpeted.
- Exhibiting company listed on website
- Exhibiting company listed in all preconference and conference publications
- Product/service listing in the Exhibitor and Sponsor Directory to be distributed on site to all attendees.
- Booth identification sign
- Pre- and postconference attendee list including name, organization and mailing address.

**Price**—$2,995
Sponsorship Opportunities

All sponsorships include numerous rewards to add value to your sponsor dollar.

Gold Sponsorships—$5,000

TOTE BAGS (Exclusive)
Make a first and lasting impression with your logo imprinted on the conference tote bag given to each attendee. Includes a brochure inserted from your organization.

ATTENDEE LUNCHEON
Large-scale luncheon will be provided for all attendees on Tuesday. Sponsorship includes your company name and logo prominently displayed on banners and table tent cards during the luncheon.

NETWORKING RECEPTIONS
Receive prime visibility at the lively networking receptions held in the exhibit hall. Sponsor either the Monday welcome reception or the Tuesday evening reception. Sponsorship includes your company’s logo prominently displayed on banners and table tent cards during the reception.

BONUS
All Gold Sponsorships include one (1) complimentary full-conference registration (a $1,195 value).

Silver Sponsorships—$3,500

LANYARDS FOR NAME BADGES (Exclusive)
Your company name and logo will be front and center when printed on the lanyard for each attendee name badge.

CONTINENTAL BREAKFASTS
Sponsor either the Tuesday or Wednesday morning breakfast. Sponsorship includes your company name on banners and table tent cards during breakfast.

BONUS
All Silver Sponsorships include one (1) conference registration discounted at 50%.

Bronze Sponsorships—$1,500

REFRESHMENT BREAKS
Choose from several enticing refreshment breaks. Sponsorship includes your company name on banners and table tent cards in the exhibit hall during the refreshment break.

BONUS
Bronze Sponsorship includes one (1) conference registration discounted at 25%.

A limited number of exhibit and sponsorship opportunities are available!

FOR EXHIBITS—Sandra Lange
(262) 373-7657 | sandral@ifebp.org

FOR SPONSORSHIPS—Diane Mahler
(262) 373-7656 | dianem@ifebp.org
LOCATION DETAILS

Chicago, the Windy City, has many sights worth seeing. Millennium Park is a 24.5-acre green space that is home to the reflective Cloud Gate sculpture and an outdoor theater. The Shedd Aquarium showcases a variety of habitats in an indoor setting. To get a view of the city as a whole, take a trip to the Willis Tower and look out from the 103rd-story Skydeck. The Field Museum of Natural History is home to the world’s largest tyrannosaurus rex ever found and has displays related to science and invention. Other notable sites include Navy Pier, Soldier Field, Chicago Cultural Center and Adler Planetarium.

CONTINUING EDUCATION CREDIT

Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification. Please note that preapproval by the governing agency is sometimes necessary. It is important, therefore, to register at least 60 days prior to the program taking place.

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

For further information on continuing education credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.

Educational sessions at this program can qualify for 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 3 days (5 days for Disney properties) of arrival. Registration fee is forfeited once program commences. For policy details, see www.ifebp.org/policies.

InterContinental Chicago Magnificent Mile
Chicago, Illinois

Embracing its historic origins, the InterContinental® Chicago hotel has an airy lobby with a sweeping staircase and marble mosaic floors. You can enjoy breathtaking views from the 32nd-floor Tower Lounge and wind down with a sauna, a massage or a swim in the classic 1920s pool. Flawless service and gourmet cuisine typify Michael Jordan’s Steak House & Bar, and you can savor fine wines by the fire in the stylish ENO bar.

InterContinental Chicago
Magnificent Mile
Chicago, Illinois

CONNECT Global Benefits Summit
# REGISTRATION/2020

## CONNECT Global Benefits Summit

<table>
<thead>
<tr>
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### Not a Member? Join Now and Save!

To receive member rates and more, visit www.ifebp.org/join.

## Registration Information

| Bill to organization name | | |
| Bill to organization ID # | | |
| Badge name | Badge title | |

### Special assistance—specify

### Special dietary requirements—specify

## CONNECT Global Benefits Summit

May 11-13, 2020 • Chicago, Illinois

### Early Fee

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<th>Member</th>
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<th>Employer Pricing</th>
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### Late Fee

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<td>US$1,095</td>
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* Please register for Service Provider Pricing if you support external clients by providing a product or service to other employers.

### Hotel

InterContinental Chicago Magnificent Mile (US$259 single/double)

Reservation deadline is April 6, 2020.

Include US$400 hotel deposit.

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<th># of Adults</th>
<th># of Children</th>
<th>King bed</th>
<th>Two beds</th>
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</thead>
</table>

| Arrival date | Departure date | |

### Continuing Education Credit

The International Foundation will apply for CE credit based on requests indicated below.

- [ ] Actuary
- [ ] Attorney
- [ ] CFP
- [ ] CIMA
- [ ] CPA
- [ ] HRCI
- [ ] Insurance producer*
- [ ] SHRM
- [ ] Other, specify

Licensed in the state(s)/province(s) 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. NOTE: Requests made for CE credit on this form do not guarantee administration of credit.

### Payment Must Accompany Order

- [ ] Cancellation fees apply. See www.ifebp.org/policies.

Make check payable to International Foundation.

- [ ] Check # ____________________________ $ ____________________________

- [ ] Credit card # ____________________________

- [ ] Exp. date ____________________________

- [ ] Cardholder’s name (print) ____________________________

### Registration/Order Summary

- [ ] Membership fee US$_________

- [ ] Conference fee US$_________

- [ ] Hotel deposit (US$400) US$_________

- [ ] Total (U.S. funds) US$_________

Questions? Email edreg@ifebp.org, or phone (888) 334-3327, option 2.

www.ifebp.org  Secure fax (262) 384-1818  International Foundation P.O. Box 689954, Chicago, IL 60695-9954
REGISTER NOW!

Join us for this exciting new conference, featuring expert-led sessions and valuable networking opportunities with your global benefits peers.

Visit www.ifebp.org/CONNECT.

May 11-13, 2020 | Chicago, Illinois