Construction Industry Benefits Conference
November 13-14, 2017 | Loews Santa Monica | Santa Monica, California
#IFConstruct

Collection Procedures Institute
November 15-16, 2017 | Loews Santa Monica | Santa Monica, California
#IFCollect

ATTEND BOTH programs and save $250!
The Construction Industry Benefits Conference and the Collection Procedures Institute are held consecutively so you can make the most of your time away. Use discount code CONST17 when registering for both programs to save $250.

Construction Industry Benefits Conference
November 13-14, 2017 (pages 3-8)

Collection Procedures Institute
November 15-16, 2017 (pages 9-12)

The words “Southern California” conjure up an intoxicating blend of sun, sand and surf. Loews Santa Monica Beach Hotel provides an exclusive beachfront hideaway with dramatic views of Santa Monica Beach and the Pacific Ocean. With freshly redesigned guestrooms and inspiring leisure activities, the hotel is a premier getaway near Santa Monica Pier.

The International Foundation has secured a reduced room rate of $289 for a single/double room for our conference attendees. To receive the conference rate, you must book your room through the International Foundation by specifying your hotel needs on your registration form. The reservation deadline is October 16, 2017.

Santa Monica
Santa Monica offers more than its beach and year-round warm weather. Its proximity to the greater Los Angeles area makes Santa Monica the perfect base for vacationers and business travelers alike. With 3.5 miles of coastline and a diverse mix of shopping, dining, entertainment and outdoor recreation, Santa Monica is a fun option for conferences and educational programs.

Travel and Entertainment
Most major airlines fly into Los Angeles International Airport (LAX). Visit www.santamonica.com for information on Santa Monica area attractions, dining, shopping, nightlife, golf and more.
The Construction Industry Benefits Conference offers a unique opportunity to gather with those who face similar challenges in your industry. This conference is designed to provide a forum for examining the latest trends, sharing experiences and solutions, reviewing legislative and regulatory changes, and considering the most effective strategies for delivering benefits to participants in the construction industry. Join trustees, administrators and plan professionals to tackle the administrative and strategic benefits issues of today and tomorrow.

Who Should Attend
- Multiemployer trustees, both labor and management who serve on building trade health and pension funds
- Third-party administrators, fund office administrative staff and key personnel
- Professionals serving the construction industry including attorneys, accountants, consultants and service providers

Key Takeaways
- Learn from your peers who face similar challenges what has and has not worked.
- Discover the latest trends of what is happening in your industry.
- Hear from experts what best practices are being implemented.
- Understand how the latest regulatory changes and legislative initiatives will impact your plans.

Visit www.ifebp.org/construction to register today.

“\nI would recommend this program because it reinforced that our committee’s legal and financial professionals are on the right path.\n”

Charles Graf
Labor Trustee
NECA Local 145 IBEW Pension Fund
Clinton, Iowa
Construction Industry Benefits Conference
November 13-14, 2017

SUNDAY, NOVEMBER 12, 2017

3:00-5:00 p.m.
Registration

MONDAY, NOVEMBER 13, 2017

7:00-8:00 a.m.
Registration and Continental Breakfast

8:00-9:15 a.m.
Opening Keynote: The Opioid Crisis

Opioid abuse has reached epidemic proportions. Its impact on society is far-reaching. This session will help you understand the magnitude of the problem and options for how your funds might respond.

- Role of plan sponsor
- Dealing with mental health and substance abuse
- Carve-outs and other design options
- EAP programs
- Impact on retirement, pension and bargaining

9:30-10:45 a.m.
Legal and Legislative Update

There is a flurry of legal and legislative activity that professionals need to be aware of. This session will provide an overview of key laws, regulations and court cases that may impact your plan. Topics may include:

- NLRB
- Prevailing wage and right-to-work
- Fiduciary responsibilities
- Vacation PTO/sick time
- EEOC regulations
- Drug testing
Health Care Support for Members, Participants and Dependents

Between the medical challenges posed by increased opioid abuse and the necessity to maintain health in a labor-intensive industry, benefit plans are facing new challenges every day. This session discusses various options that your health and welfare plan can implement to help support participants and beneficiaries, including:

- Opioid abuse in the construction industry
- Wellness programs
- Employee assistance programs (EAPs)
- Drug testing
- Getting help—Resources

DB Pension Strategies—Part I

The first part of this two-part session will review the past, present and future of defined benefit pension plans including:

- Historical—How did we get here?
- Composite plans
- MPRA status
- Assumptions

Health Care Update

Health care has continued to take center stage in political discussions this year. This session will focus on the current status of health care delivery and how these changes may impact your plans. Topics include:

- History
- Status—Impact on construction funds
- Compliance time line
- ACA audits

DB Pension Strategies—Part II

The second part of this two-part session will dive deeper into pension plans by discussing funding and various strategies that can be used to maintain financial viability. It will cover:

- Your zone, your strategy
- Tools: voluntary red zone
- Withdrawal liability analysis
3:15-4:30 p.m. Concurrent Sessions

**Health Care Strategies**
This session will focus on the strategies and best practices that should be used to ensure cost containment, population health and efficiency in your health and welfare plan. Topics include:
- Value-Based designs
- Rx programs
- Medical clinics
- Retiree strategies
- Coverage issues—LGBTQ spouses

**Maximizing Your Defined Contribution Plans**
This session covers the most effective methods to manage defined contribution plans and includes discussion on:
- Plan design features and options—Self-directed vs. trustee-directed
- Fee disclosure and fee structure
- Participant education
- Payout options—Lump-sum distribution vs. accumulation
- Service providers—Contracts, due diligence

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**TUESDAY, NOVEMBER 14, 2017**

7:00-8:00 a.m.
**Registration and Continental Breakfast**

8:00-9:15 a.m.
**Investment**

One of the most pressing challenges for benefit plans is maintaining financial stability. This session will provide guidance on how to get the most from the resources at your disposal in order to make investment choices for your pension, health and welfare and training benefit funds. Topics include:
- Strategies to meet your needs
- Investment policy statement
- Managing your manager
- Questions to ask your financial manager
9:30-10:45 a.m. Concurrent Sessions

Best Practices in Drug Testing

The ongoing opioid crisis, alongside other drug abuse concerns, has substantially increased the use of drug testing in the building and construction industry. This session will cover typical issues that are likely to arise following the implementation of drug testing procedures including:

- Goals
- Policies and standards
- Participant appeals
- Cross-state issues
- Recreational drugs vs. prescription drugs
- Testing methods

Hot Topics in Apprenticeship Programs

Apprenticeship and training programs are developing tomorrow’s workforce. This session will consider hot topics and best practices in apprenticeship programs today including:

- Articulation agreements
- Recruitment and retention
- Developing a healthy workforce through financial literacy, apprenticeship regulations and soft skills
- Journeyman upgrade and safety training
- Grant funding
- Drug testing

Project Labor Agreements

This session covers the basics concerning PLAs and the effects they may have on your benefit plans. Topics include:

- Labor relations
- Collective bargaining over health care and retirement
- Collective bargaining over plan language
- Participation agreements and nonbargaining employees for employers

11:00 a.m.-12:15 p.m. Concurrent Sessions

The 2 Hat Dilemma: Which Hat Are You Wearing?

This session will examine case studies meant to highlight the responsibilities you have as a trustee and as an officer, employee, agent or other representative in your organization. Discussion will also focus on the differences between labor and management trustees, and what each group should learn from each other. Topics include:

- Labor/Management issues
- What does labor want to know from management trustees?
- What does management want to know from labor trustees?
- How to best work together
TUESDAY, NOVEMBER 14, 2017 (CONT.)

11:00 a.m.-12:15 p.m. Concurrent Sessions (cont.)

Marketing Your Plan as a Recruitment or Retention Tool
Finding and keeping qualified employees is constantly a challenge. This session will discuss the best tactics to obtain and hold onto the best workforce you can including:

- Retention
- Recruitment
- Diversity
- Articulating your value proposition
- Communication with participants

12:15-1:45 p.m.
Luncheon

1:45-3:00 p.m.
Meaningful Benefit Plan Management Tools
This session will provide an overview of typical management tools at your disposal to help ensure that your benefit plan runs as smoothly as possible. Topics include:

- Benchmarks
- Dashboards
- Resources
- Strategic planning
- Policies and procedures
- Succession planning

3:15-4:30 p.m.
Technology in Construction Today and Tomorrow
Technology plays a significant role in all of our lives. Advancements in technology have affected the construction industry in unexpected ways, and this session will cover both the technological advancements of machinery used at construction sites and common practices employers implement to monitor employees both on and off the job. Topics include:

- Impact of mobile devices on safety and security
- Using technology to monitor employees
- Future of construction through technology

SAVE THE DATE . . . AND SPREAD THE WORD
for a unique educational program early next year!

Institute for Apprenticeship, Training and Education Programs
January 15-17, 2018 | Hilton Americas-Houston | Houston, Texas

Apprenticeship, training and education programs provide the tools and resources to equip workers for the next generation of jobs. The Institute for Apprenticeship, Training and Education Programs combines education needed to run a trust fund with best practices for executing an effective apprenticeship program. This program will address current issues and provide attendees with a way to reevaluate their training programs.

For additional information, contact us at (888) 334-3327, option 2.

www.ifebp.org/apprenticeshipinstitute
The Collection Procedures Institute is designed to provide the practical information you need to fulfill your fiduciary obligation to collect benefit payments. Collections are a critical and complex process that affects the overall financial health of your fund. In this economic, legal and regulatory environment, you cannot afford to ignore your collections program. Register for this conference to hear expert professionals and practitioners share trends, legal and legislative updates, and best practices so you can benchmark your policies and procedures and network with others who share similar challenges.

**Who Should Attend**
- Multiemployer trustees, both labor and management, from small and large funds in all industries
- Those representing small and large funds in all industries
- Certified public accountants
- Payroll auditors and collection coordinators
- Attorneys
- Salaried and third-party administrators
- Administrative staff

**Key Takeaways**
- Understand the collections process
- Learn effective strategies and trends from experts and practitioners
- Hear how recent legal decisions impact your plans
- Best practices to implement
- Sample documents, checklists and other prototypes
- Networking and interactive sessions allow you to learn from your peers

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

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*The Collection Procedures Institute was a mirror image of my job description. It helped me connect some dots and plugged some gaps. It was a very helpful conference.*  

*Steven Rusch*  
Delinquency Manager  
Midwest Operating Engineers Fringe Benefit Funds  
Countryside, Illinois
Collection Procedures Institute
November 15-16, 2017

TUESDAY, NOVEMBER 14, 2017
3:00-4:30 p.m.
Registration Open

WEDNESDAY, NOVEMBER 15, 2017
7:00-8:00 a.m.
Registration and Continental Breakfast
8:00-9:15 a.m.
Team Collections
This session will set the stage for the entire conference. Learn about fiduciary responsibility in collections and who does what including:
- Fiduciary responsibility
- Players—roles—interactions
- Policies you should have
9:30-10:45 a.m.
The Collections Process
Overview of the collections process with review of how your collections program should be structured. Topics include:
- Processes and procedures you should have
- Collective bargaining agreements, participation agreements and project labor agreements
- Remittance process
- Activation of the delinquency process
- Delinquency committees
- Arbitration
11:00 a.m.–12:15 p.m.
Collection Operations
This session will focus on the operational aspects of administering your collections program:
- Administrative role
- Data access and security
- Notifications
- Sample documents
- Employer training
12:15-1:15 p.m.
Luncheon
1:15-2:30 p.m.
Payroll Auditing
Efficient payroll audits require many players, a good process and solid policies. This session will focus on:
- Payroll audit selection
- Payroll audit process
- Reports
- Questions you should ask
WEDNESDAY, NOVEMBER 15, 2017 (CONT.)

2:45-4:00 p.m.
Winning Your Case
At the end of the day, it’s all about collecting the benefit payments. Sometimes that involves litigation. This session will cover:

- Litigation procedures
- Prepping witnesses
- Settlements

THURSDAY, NOVEMBER 16, 2017

7:00-8:00 a.m.
Registration and Continental Breakfast

8:00-9:15 a.m.
Beyond the Signatory Employer
In collections, many unique situations exist where it’s difficult to identify contributing employers. This session will give you clues to help identify contributing employers in situations that make the collections process more complex including:

- Personal liability
- Other companies
- Bonds
- Liens

9:30-10:45 a.m. Concurrent Sessions
Advanced Payroll Auditing
This breakout session will take a deeper dive into payroll auditing including:

- Payroll audit challenges
- Auditor selection and retention
- Modifying the audit program
- Advanced auditing techniques

Withdrawal Liability and Collections
This session will examine withdrawal liability in collections including:

- Understanding the types of withdrawal liability
- Withdrawal liability policy and procedures
- Arbitration
- Notice requirements
- Settlements
- Accounting for withdrawal liability
Collections and Bankruptcy

Dealing with collections in bankruptcy requires an understanding of the process and options available. This session will help you understand the bankruptcy process and will cover:

- Preserving the fund rights
- Importance of automatic stay
- Procedures to protect the fund/plan interests
- Litigation
- Impact on collections

Fraud in Collections

This session will discuss common scams, schemes and best practices to prevent and detect fraud. Topics include:

- Types of fraud
- Classification
- Eligibility issues
- Cash off the books
- Double books
- War stories

Luncheon

1:15-2:30 p.m.

Unique Collections Cases—You Be the Judge

This session will cover a variety of key collection cases, allowing you to judge the merits and learn key takeaways.

2:45-4:00 p.m.

Guided Open Forum—Answering Your Questions

This session will include a panel of professionals who will address topics submitted by the audience throughout the conference. It is an opportunity to share war stories and learn of successes and failures.
The International Foundation provides more than just objective conferences. Turn to the Foundation for timely, relevant news, education and information. Check out some of our most popular resources.

**Trustee Resource Center**
www.ifebp.org/trusteeresource
Find the information you need as a trustee regarding your fiduciary duties and responsibilities.

**ACA University**
www.ifebp.org/acau
An educational resource covering the latest must-know ACA information for employers. The virtual environment contains live webcasts, discussions, resources, frequently asked questions and sample documents to help you implement ACA regulations.

**Financial Education/Retirement Security**
www.ifebp.org/retirementsecurity
Recent news and timely resources on the future of retirement and financial literacy.

**Survey Results**
www.ifebp.org/research
The Foundation provides results of recently conducted surveys covering all the latest issues including wellness, mental health, financial education and benefit communications.

**Apprenticeship Resource Web Page**
www.ifebp.org/apprenticeshipresources
News, survey data and case studies pertaining to changes in training and apprentice trust fund legislation.

View all the resources we have to offer our members at www.ifebp.org/membership.
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 45 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 e-mail continuinged@ifebp.org.

Educational sessions at this program can qualify for CEBS continuing professional education (CPE) credit. Visit www.cebscpe.org for additional information.

POLICIES

Visit www.ifebp.org/policies for complete registration/cancellation/refund/record retention/photo release and privacy 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 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, Discover and American Express).
- 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.
- Educational transcript request form: www.ifebp.org/aboutus/policies/recordretention

SPONSORSHIPS AVAILABLE

Sponsorship opportunities are available for the Construction Industry Benefits Conference AND the Collection Procedures Institute. Show your support for the educational mission of the International Foundation and enjoy valuable exposure to this highly targeted audience of decision makers. For more information on all the value-added sponsor rewards, contact Diane Mahler at dianem@ifebp.org or call (262) 373-7656 for details.

RELATED READING

Payroll Audit/Collections Combo

Payroll Auditing: A Guide for Multiemployer Plans is a step-by-step guide that includes a collection of letters, checklists and other forms that can be adapted for individual situations. Collecting Employer Contributions: The ERISA Litigation Guide is essential reading for multiemployer funds pursuing payroll information and delinquent contributions.

- Item #7303K.
- $80 (Members: $45) (Price includes shipping and handling.)
- To order, see the registration form or visit www.ifebp.org/books.asp?7303K.

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**Membership dues are reduced quarterly. Visit www.ifebp.org/join for current rates.**

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**Badge title**

**Organization representing**

**Organization**

**Address**

**City**

**State/Province**

**Country**

**ZIP/Postal code**

**Phone**

**E-mail**

**Number of adults**

**Number of children**

**Special requests—describe**

**Date of birth (mm/dd/yyyy)**

**Exp. date**

**Make check payable to International Foundation.**

**Full payment in U.S. funds must accompany order.**

**Guide**

Collecting Employer Contributions: The ERISA Litigation and Payroll Audit/Collections Combo

**Item #**

**Price**

**Prices include shipping and handling.**

Additional information at www.ifebp.org/bookstore.

**Hotel**

**Reservation Deadline:** October 16, 2017

**Loews Santa Monica Beach Hotel—$289 single/double**

**Check #**

**Amount**

**Mail the registration form with check or credit card number to:**

**Registration/Order Summary**

- **Membership fee**
- **Registration fee**
- **Hotel deposit ($350)**
- **Book**
- **Continuing education fee ($25)**
- **Total (U.S. funds)**

**CEBS CPE** Continuing education forms are not required to earn CEBS CPE credit. By checking this box you will be provided with continuing education forms in your registration packet. These forms can be turned in at the program for a CPE certificate for documentation and to assist you with self-reporting your CEBS CPE credits. **$25 CE fee does not apply.**

Visit www.cebscpe.org for additional information on reporting CEBS CPE credit hours.

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- **(888) 334-3327, option 2,** or **(262) 786-6710, option 2.**