On-Site Education

www ifebp org/onsite-education
Invest in Your Workforce and Invest in Success

The International Foundation’s flexible on-site training brings industry-leading education to your workplace. As your partner in education, we work with you to meet your unique training goals.

Four Reasons to Choose On-Site Education for Your Organization

1. **COST-EFFECTIVE**
   Train your entire team without the added expense of travel.

2. **CONVENIENT**
   Maximize productivity by eliminating travel time and scheduling training when it works best for your workforce.

3. **TEAM BUILDING**
   Strengthen communication, motivate employees and build problem-solving skills through a shared learning experience.

4. **CUSTOMIZED**
   We can customize content to fit your exact training needs!

Your employees are the most valuable asset you have. Choose on-site education from the International Foundation to ensure their success—and yours.
Our Training Solutions Are as Unique as Your Organization

LEARN MORE at www.ifebp.org/onsite-education.

Face-to-Face:
Bring the experts to you—your city, your workplace, your staff. Having a subject matter expert at your organization allows for a one-of-a-kind learning and team-building experience.

E-Learning Courses:
Industry-leading online education provides comprehensive and interactive training for your staff. Courses that can be housed on your internal LMS for easy tracking and grading.

CEBS:
Certified Employee Benefit Specialist® (CEBS®) is the most respected designation in the industry. CEBS is cosponsored by the International Foundation and Dalhousie University.

Webcasts:
A series of webcasts is a cost-effective and convenient way to train staff no matter where they are located. Direct interaction with subject matter experts allows for your specific issues to be addressed.

Choose a single format, or customize your education by blending multiple formats. The Foundation offers both off-the-shelf and customized training solutions.
Face-to-Face Courses

Face-to-face programs bring the experts directly to you, providing a one-of-a-kind learning and team-building experience. Some of our most popular on-site education courses include the following:

**Foundations of Trust Management Standards (FTMS®)**

Trustees play a crucial role in addressing the health and retirement needs of plan members. New trustees, in particular, must quickly gain an understanding of the basic principles of trust fund management and know where to find answers to make informed decisions. FTMS is the first step in focusing on these needs. FTMS increases Canadian trustees’ knowledge and understanding for effectively managing trusts, covering legal, administration, governance and funding/investment/finance.

**Advanced Trust Management Standards (ATMS™)**

For Canadian trustees who have completed the FTMS Certificate of Achievement, the ATMS program is the next step to expand upon the four key knowledge areas of legal, administration, governance and funding/investment/finance. Attendees will deepen their understanding of pension and health and welfare applications and develop related skills.

“The on-site education allowed for a much more personal discussion among attendees. We were able to have open and candid conversations while building a network of peers.”

*Alana Shearer-Kleefeld, GBA*
Manager, Benefits Administration, 3sHealth

Contact us at: onsiteedu@ifebp.org
Certificate Series
The Certificate Series offers educational opportunities in each of the areas of benefits and compensation. The courses combine history and terminology with current events for a comprehensive learning experience for your team.

Certificate in Canadian Benefit Plans
The Certificate in Canadian Benefit Plans will help your staff gain a solid understanding of pensions and benefits, human resources and compensation that is critical to working successfully with employees. Learn practical information about the Canadian pensions and benefits landscape.

Other Popular Program Topics
- Apprenticeship Program Management
- Conflict Resolution
- Customer Service
- Diversity Training
- Deliberate and Impactful Training
- Harassment Training
- Strategic Planning

On-site education from the International Foundation provided a personal touch for our employees. It allowed us to bring the Foundation to us and to reach everyone in our organization at one time.

Chris Brecht, GBA, RPA
Chief Executive Officer, Carday Associates
E-Learning Courses

**Individual E-Learning Courses**

Whether your organization needs entry-level coursework to onboard new employees or advanced training to keep seasoned employees knowledgeable about industry changes, the Foundation can help.

After students successfully complete each course, an exam will assess their understanding—allowing both the student and the organization to document their achievement.

When purchasing e-learning to train your team, you can save up to 50% off the regular pricing. You can also tailor the e-learning to meet your organization’s unique needs.

**Courses Can Be Hosted by the Foundation**

Choose to immediately enroll your team into existing e-learning courses by purchasing training units and having students directly enroll into the course.

**Courses Can Be Hosted on Your LMS**

Place e-learning courses on your learning management system (LMS) to allow you to easily integrate training into your systems and processes.

**Courses Can Be Customized**

Design a custom curriculum using existing and new course content to meet your exact training needs.

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I would without a doubt recommend on-site education from the International Foundation. We were extremely pleased with the entire experience.

Jim Hoppe  
Vice President, Benefit Plan Administration
E-Learning Courses

Retirement Plans
- The Retirement Landscape
- Employer-Sponsored Retirement Plans
- Retirement Plan Sponsor Responsibilities
- Life Cycle of a Group Retirement Plan

Group Benefits
- The Group Insurance Landscape
- Group Benefits Design and Administration
- Group Benefits Funding and Pricing
- Life Cycle of a Group Benefits Plan

Webcasts

Webcasts can be a straightforward way to train your team on specific benefits issues. Team members from a single office or multiple locations can easily gather for comprehensive training without travel costs. Subject matter experts will lead the presentation and provide an interactive question-and-answer session to address your organization’s specific issues.

Webcasts can be offered on almost any benefits topic, including group benefits, retirement plans and compliance regulations.
How Does CEBS Help Strengthen Your Team?

The CEBS (Certified Employee Benefit Specialist) designation provides the university-calibre knowledge you need by partnering with Dalhousie University. The program is focused and engaging while incorporating real-life applications.

**Benefits Departments**

*(benefits and pension managers, administrators, executives, generalists and specialists)*

Use the CEBS program to build a team of bright professionals ready to hit the ground running. CEBS curriculum provides the application elements that allow you to apply your knowledge from day one. Arm yourself with the knowledge you need to ask advisors questions and confidently answer those you receive each day.

**Sales Teams and Professional Services**

*(agents, brokers, producers, account managers, account execs, consultants, actuaries, lawyers, accountants, third-party administrators)*

CEBS gives your organization a competitive edge with the “best-of-the-best” staff, resulting in increased business revenue and client retention. Ramp up your strategy with critical knowledge to put into action immediately and grow your business.
The Details of the Learning Experience

Your team members will earn their CEBS by completing all five courses: GBA 1, GBA 2, RPA 1, RPA 2 and GBA/RPA 3. Individuals can earn their GBA or RPA designation by completing three courses as described below.

It is recommended to start with GBA 1 or RPA 1. Complete all five and have a well-rounded foundation of employee benefits.

CEBS Designation

<table>
<thead>
<tr>
<th>GBA 1</th>
<th>GBA 2</th>
<th>RPA 1</th>
<th>RPA 2</th>
<th>GBA/RPA 3</th>
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Curriculum Courses

*Five Required Courses for CEBS*

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<tr>
<th>Course</th>
<th>GBA</th>
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<tr>
<td>Navigating the Plan Environment</td>
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Customized Education

Let’s Develop an Education Strategy Together

At the International Foundation, we want to be your partner in education. Let’s talk about your training goals and develop a strategy together.

With more than 60 years as a leading employee benefits education provider, we can easily help you prioritize your objectives and customize a cost-effective solution to meet your unique needs.

Employee Benefits Training Topics

- Administration
- Communications
- Compensation
- Fiduciary responsibility
- Funding methods
- Governance
- Investments
- Legal/compliance
- Management/leadership
- Retirement plans
- Supplemental group health plans
- Vendor relations

Choose from face-to-face programs, online training or a combination of the two. We can customize the format to fit your educational needs.
Meeting and Event Management Services

Your Full-Service Meeting Logistics Partner | www.ifebp.org/eventmanagement

Let us leverage our relationships with conference centres, hotels and vendors to put together a seamless event for your organization. Our team of certified meeting professionals (CMPs) will assist you with planning and executing a successful event, taking the pressure and tedious tasks off your hands.

Meeting Management
A talented team of CMPs will assist you with planning your meeting.

Audiovisual Services
Let our expert staff incorporate new production elements into your show or meeting.

Registration and Housing
A full-service team approach ensures your attendees have a good experience with registration and securing their hotel reservations.

The Foundation’s meeting management is always professional and cordial and meets every deadline. There’s never a worry about their performance, and they are quite adaptable when those last-minute on-site challenges occur.

Vicki Maxwell
LMCI Administrative Assistant, Painters & Allied Trades LMCI
On-Site Education

Your Employees. Your Office. Your Goals.
Our Expertise.