



Washington Legislative Update

May 6-7, 2024

The Capital Hilton | Washington, D.C.

www.ifebp.org/washington

International Foundation
OF EMPLOYEE BENEFIT PLANS 

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There have been big changes in D.C. The last election cycle flipped control of the House. We then had a new member of the Supreme Court seated. As we head into the presidential election this fall, you can expect benefits issues to be at the forefront of the national dialogue. Discover the key players affecting upcoming regulatory and legislative initiatives by joining us for the Washington Legislative Update this May. Connect with your peers as you get the most up-to-date information on the issues impacting your plans and participants.

Don't miss the opportunity to attend this program—your pipeline to what's happening on the Hill.

Who Should Attend

This program is designed for those who need to understand the legal, legislative and regulatory environments surrounding employee benefits. It is especially valuable to decision makers who are involved in leadership, oversight and strategic planning. The content is designed for trustees, administrators and plan professionals who work with the following types of plans:

- Multiemployer
- Single employer
- Public sector.

Save \$300 when
registering by March 25!

Why You Should Attend

- **DUTY**—You have a fiduciary responsibility to stay informed of the issues impacting your plans.
- **KNOWLEDGE**—Compliance with legislation and regulations significantly impacts your plans and your operations. The more you know, the better you can manage.
- **STRATEGIC PLANNING**—Take away an understanding of the issues so you can plan for the future.
- **RESOURCES AND NETWORKING**—Learn from experts, insiders and your peers about what to avoid, resources to tap into and best practices to implement.
- **HAVE YOUR VOICE HEARD**—The conference is scheduled to end early at 3:00 p.m. on Monday, May 6, allowing for time to meet with your elected representatives . . . Make your appointments now!

PROGRAM AT A GLANCE

SUNDAY May 5, 2024			
4:00-6:00 p.m.	Registration		
MONDAY May 6, 2024			
7:00-7:30 a.m.	Registration		
7:30-9:00 a.m.	Opening Breakfast Session: ERISA at 50!		
9:15-10:30 a.m.	ERISA Preemption Panel Discussion	Engaging With Government Officials	
10:45 a.m.-12:00 noon	Single Employer Breakout Session	Multiemployer Breakout Session	Public Sector Breakout Session
12:00 noon-1:30 p.m.	Lunch Session: Wage and Hour Update		
1:45-3:00 p.m.	Meet the Regulators	Overview of Labor Law Environment	
TUESDAY May 7, 2024			
7:30-9:00 a.m.	Breakfast Session: Update on the 2024 Presidential Election		
9:15-10:30 a.m.	Health Care Update	Evolving Retirement Plan Designs	
10:45 a.m.-12:00 noon	Medicare Advantage Then and Now	Implications of Auto-Portability Initiative	
12:00 noon-1:30 p.m.	Lunch Session: EBSA Update		
1:45-3:00 p.m.	Reining in the Prescription Drug Industry	Hot Topics in Investment Oversight	
3:15-4:30 p.m.	Closing Session: Warning! Cybersecurity Threat		

Session topics and speakers are subject to change based on evolving and late-breaking issues of importance to Foundation members.

Please note that the final sessions on Monday end at 3:00 p.m., allowing for time to meet with government officials. Plan ahead and make your appointments now. The last session on Tuesday ends at 4:30 p.m. Please make your travel plans accordingly.

SUNDAY | MAY 5, 2024

4:00-6:00 p.m.

Registration

MONDAY | MAY 6, 2024

7:00-7:30 a.m.

Registration

7:30-9:00 a.m.

Opening Breakfast Session: ERISA at 50!

It's been 50 years since the passage of the Employee Retirement Income Security Act of 1974 (ERISA). This session will look at what has been achieved for plan participants and the employee benefits industry over time and what the future holds given the current legislative and regulatory environment.

9:15-10:30 a.m. | **Concurrent Sessions**

ERISA Preemption Panel Discussion

This cross-sector panel discussion will address how single employer, multiemployer and public sector plan sponsors are dealing with issues relating to ERISA preemption as state and federal initiatives intersect. Topics may include state cost control initiatives, action in the courts, reproductive rights and why it's so important for each sector to understand what others are dealing with.

Engaging With Government Officials

Many conference participants use their time in D.C. to meet with their elected representatives and the regulatory community. This session will help you maximize your engagement efforts as you hear from the experts on:

- Why you need to know this
- The details of the legislative process
- The players who impact benefits
- How to communicate with legislators, regulators and plan participants.

MONDAY | MAY 6, 2024 *(continued)*

10:45 a.m.-12:00 noon | **Concurrent Sessions**

Multiemployer Sector Breakout Session

Join your peers to discuss the issues, challenges and opportunities facing multiemployer plans today.

Public Sector Breakout Session

Join your peers to discuss the issues, challenges and opportunities facing public sector plans today.

Single Employer Sector Breakout Session

Join your peers to discuss the issues, challenges and opportunities facing single employer plans today.

12:00 noon-1:30 p.m.

Lunch Session: Wage and Hour Update

Jessica Looman serves as administrator of the Wage and Hour Division of the United States Department of Labor and has been invited to share their latest initiatives to promote and achieve compliance with labor standards to protect and enhance the welfare of the nation's workforce.

1:45-3:00 p.m. | **Concurrent Sessions**

Meet the Regulators

Representatives from the key agencies (including the DOL, IRS, PBGC and HHS) responsible for enforcement and oversight in the employee benefits industry have been invited to share updates on their initiatives and address issues of concern.

Overview of Labor Law Environment

This session will consider recent changes to labor law and provide insight on:

- NLRB activity
- Changes to salary thresholds for salaried vs. hourly workers
- Benefits implications resulting from recent labor action
- How labor issues are playing out in the current election cycle.

MONDAY | MAY 6, 2024 *(continued)*

3:00 p.m.

Day One ends, allowing for time to meet with government officials. Plan ahead and make your appointments now.

TUESDAY | MAY 7, 2024

7:00-7:30 a.m.

Registration

7:30-9:00 a.m.

Breakfast Session: Update on the 2024 Presidential Election

The world is watching and much is at stake with the clash of geopolitical, economic and judicial influences. Get the inside scoop on the upcoming election cycle. This session will provide insights on the key issues driving the campaigns and consider down-ballot implications. Stay informed so you are prepared to adjust your strategic plans to the evolving climate.

TUESDAY | MAY 7, 2024 *(continued)*

9:15-10:30 a.m. | **Concurrent Sessions**

Health Care Update

This session will bring you up to speed on the legislative and regulatory environment surrounding health plans, including:

- Legislation in the pipeline
- How the election will impact health policy in the near term
- Compliance issues: the No Surprises Act, MHPAEA and Consolidated Appropriations Act
- Questions you should be asking.

Evolving Retirement Plan Designs

Retirement plan designs continue to evolve as a result of marketing conditions, legislative and regulatory initiatives, and consumer behavior. This session will look at the drivers of change, how plans are changing, and what it means for plan sponsors and participants. Topics include:

- Lifetime income-based plans
- Cash balance
- Hybrid plans.

TUESDAY | MAY 7, 2024 *(continued)*

10:45 a.m.-12:00 noon | **Concurrent Sessions**

Medicare Advantage Then and Now

Medicare is often a target of legislative and regulatory activity. The program is also a huge driver of price and design in the employer-sponsored markets, which is why understanding the program gives insights on the direction of health care in the near future. Topics include:

- Medicare history, from Risk to Plus Choice to Advantage
- How the Inflation Reduction Act and other recent legislation impacts Medicare
- New plan designs.

Implications of Auto-Portability Initiative

There is currently an initiative for a consortium of private organizations to build an infrastructure system (the Portability Services Network) that would allow for efficient and secure movement of dollars and data. This would create a major expansion of auto-portability that could drastically impact the retirement system in the United States. This panel discussion will address:

- The impact on plans
- Missing participants
- Options for workers
- The role of Congress.

12:00 noon-1:30 p.m.

Lunch Session: EBSA Update

Lisa Gomez, assistant secretary of the Employee Benefits Security Administration (EBSA) of the U.S. Department of Labor, has been invited to share the latest initiatives and enforcement activity as well as address issues of concern to the employee benefits industry.

TUESDAY | MAY 7, 2024 *(continued)*

1:45-3:00 p.m. | **Concurrent Sessions**

Reining in the Prescription Drug Industry

This session will look at federal and state legislation and regulation with consideration given to:

- The interplay between Medicare and Medicaid
- Constraints on manufacturing and pricing
- Out-of-country supply—Rx tourism
- Litigation.

Hot Topics in Investment Oversight

This session will address hot topics in the oversight of investment assets, including:

- SEC guidance
- China
- ESG (environmental, social and governance) Investing
- Pending regulations.

3:15-4:30 p.m.

Closing Session: Warning! Cybersecurity Threat

Technological advances and the evolution of AI are creating more opportunities for criminals and more risk exposure for organizations. The amount of dollars invested in benefit plans combined with their volume of private participant data make benefit plans a ripe target to cybersecurity threats. This session will address:

- Hacking schemes
- Your fiduciary responsibility
- Legislative and regulatory activity
- What you should be doing.

Hotel Information



The Capital Hilton

Combining style, historical character and an enviable location, the Capital Hilton is the place to stay when visiting Washington, D.C. It is conveniently located just blocks from the capital's best attractions, including the White House, the National Mall, and many museums and restaurants. Recognized on the National Register of Historic Places, this hotel in downtown D.C. is located near three Metro subway stations. With comfortable rooms and suites, a great restaurant, a health club and a day spa, the Capital Hilton offers all you need for an unforgettable trip to D.C.

The International Foundation has secured a rate of \$362 for single/double occupancy through April 1, 2024. You will be charged a \$450 deposit upon registration. Please specify your hotel requirements on the registration form.

International Foundation Resources

The International Foundation provides more than just educational conferences and events. Turn to the Foundation for timely, objective resources designed just for you. Check out some of our most popular offerings below, many exclusive for Foundation members.



STAY COMPLIANT

Legislative and Regulatory Updates—Find vetted, expertly curated updates out of Washington and Canada on issues impacting the employee benefits landscape.

Today's Headlines—Stay ahead of benefit regulations with daily compliance alerts, benefits news stories, and industry legislative and regulatory updates.



MAKE CONNECTIONS

Jobs in Benefits/Career Resource Center—Find your next great hire, develop your career as a benefits professional, learn the latest trends in benefits and get an idea of salaries in your field.

Foundation Community—Chat directly with your peers, and learn from others' conversations.



SAVE TIME AND MONEY

InfoQuick—Instantly receive articles amongst over 100 frequently asked questions about industry topics, saving hours of searching time.

Sample Documents—Enough starting from scratch. View sample policy, forms, checklists and other documents first.

Personalized Research Service—Save hours of time by letting one of our information specialists handle your complicated benefits questions.



LEARN FROM THE EXPERTS

Webcasts—Gain just-in-time information on developing benefit issues, delivered by experts, with unlimited live and on-demand webcasts.

Benefits Magazine (U.S.) and Plans & Trusts (Canada)—Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month.

Interested In Attending Other Programs?

The International Foundation has a wide breadth of programs to serve you based off your unique needs. Learn more below.

For all members in the multiemployer, public and professional sectors:

70th Annual Employee Benefits Conference

November 10-13, 2024 | San Diego, California

Seventy years ago, the first Annual Employee Benefits Conference was held to support benefits industry professionals who wanted to better understand their role. The sessions have changed, but the purpose of the conference hasn't. It's about you, your customized experience, and the content that impacts millions of organizations and workers across the United States



For those in the multiemployer sector:

Trustees and Administrators Institutes

June 22-26, 2024 | Las Vegas, Nevada

Attend the Trustees and Administrators Institutes to receive timely, relevant and balanced education on the issues that face the industry. Active trustees, administrators and professional advisers develop each session to ensure you have the most current and timely information. Join your peers in finding solutions for the future.



For service providers and those in the multiemployer sector:

Accounting and Auditing Institute for Employee Benefit Plans

June 24-26, 2024 | Las Vegas, Nevada

Virtual option available

Attend this event to stay up to date on the latest in reporting and disclosure requirements as well as best practices in your profession. This is the premier conference for those who audit employee benefit plans.





For those in the public sector:

Certificate of Achievement in Public Plan Policy (CAPPP®): Pensions and Health Parts I and II

July 30-August 2, 2024 | Boston, Massachusetts

November 9-10, 2024 | San Diego, California*

An essential program for public sector trustees, CAPPP addresses the fundamental areas involved in managing health and pension plans with distinguished faculty who bring real-life scenarios and years of experience.



For corporate benefit and HR professionals:

CONNECT Global Employee Benefits and Workforce Strategies Summit

Sponsorships and exhibits available

July 22-24, 2024 | Chicago, Illinois

Learn key issues, trends and opportunities for developing and maintaining a global total rewards strategy. This new partnership between the International Foundation and WorldatWork allows two industry leaders to combine their expertise and provide comprehensive solutions for multinational HR, employee benefits and total reward professionals.



43rd Annual ISCEBS Employee Benefits Symposium

September 15-18, 2024 | Nashville, Tennessee

The Symposium is the must-attend event for thousands of corporate benefits professionals every year. Designed with a variety of U.S., Canadian and globally oriented sessions, the Symposium is an unparalleled opportunity to learn from and alongside hundreds of industry colleagues, experts and leaders.

** Part II only*

May 6-7, 2024—Washington, D.C.

Why You Should Attend

"I find the sessions at this Washington Legislative Update of such high quality and so helpful; the program allows me to be a better trustee for my union. I now have a familiarity with the interaction between the regulators and how the federal government does impact our trust."



"I have attended this particular conference several times before and continue to return for the valuable information that is always shared. Thanks for keeping this conference on the schedule annually."



Register at (888) 334-3327 or www.ifebp.org/washington

REGISTRATION

Go to www.ifebp.org/washington to register.

CONFERENCE REGISTRATION FEES

Member early: US\$1,425 | Member: US\$1,725

Nonmember early: US\$1,645 | Nonmember: US\$1,945

Save \$300 when you register before March 25, 2024.

REGISTRATION INCLUDES

Breakfasts | Lunches | Beverage breaks

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of 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 the program commences. Visit www.ifebp.org/policies for more details and to view the current policy.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit with your registration for the program 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.



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



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Register Today!

Register by March 25 to save \$300 with the early registration discount!

Visit www.ifebp.org/washington to register, or call (888) 334-3327, option 2, for more information.

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