



PENSIONS AND BENEFITS EDUCATION 2024

www.ifebp.org

International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA
Education | Research | Leadership

THE INTERNATIONAL FOUNDATION DIFFERENCE



As uncertainties in the pensions and benefits landscape linger, the responsibilities on your plate are increasing in number and significance. Your organization is looking to you for guidance on big decisions that impact the health and financial security of your plan participants. The International Foundation is here for you, bringing you the focused education, research and information critical to making informed and sustainable decisions. What makes the Foundation different? Keep reading.

Content From the Source

Our content is developed and delivered by industry leaders and our own members, based on their needs. Learn from those who work in the field and relate to the day-to-day challenges you face.

Exceptional Networking

Nowhere else will you be able to engage with so many peers representing organizations from across the country.

Clear Tools and Takeaways

You'll leave our educational programs with white papers, sample documents, toolkits, guides and more to use today and in the future.

Timely Information

We live and breathe pensions and benefits. We are prepared with the resources you may not have immediate access to, helping you react quickly to changing laws, regulations and industry trends as they happen.

Vendor-Neutral

We provide multiple perspectives on the issues at hand, allowing you to make decisions based on balanced facts. You won't find sales presentations disguised as education.



At the Foundation, we're focused on meeting the needs of members and the benefits community. With more than 31,000 members, we're no strangers to varying schedules, learning styles and training preferences. That's why we provide different ways to access our educational materials.

Built for All Levels

Ranging in complexity from beginner to advanced, educational programs are built for all experience levels. Whether you are beginning your career or have years under your belt, you will be able to build upon your knowledge through our programs.

Continuing Education

International Foundation programs and courses are regularly approved to fulfill continuing education (CE) requirements for professional licenses and designations. For full details, visit www.ifebp.org/canadianCE.

Education From Anywhere

The Foundation offers different delivery formats so you can choose the educational methods that work best for you. From in-person programs to online certifications—even customized education at your workplace—our educational materials and presentations are professional and engaging.

IN-PERSON
CONFERENCES
AND
WORKSHOPS

ONLINE
LEARNING

CUSTOMIZED
EDUCATION
FOR YOUR
WORKPLACE

EDUCATIONAL PROGRAMS

www.ifebp.org/education



Canadian Investment Institute*

November 13-15, 2023 | Waikoloa, Hawaii

Attendees will gain valuable insights and actionable solutions to positively change portfolio performances.



Institute for Apprenticeship, Training and Education Programs*

January 22-24, 2024 | Las Vegas, Nevada

Preconference: January 21, 2024

Virtual option available

The Institute for Apprenticeship, Training and Education Programs provides education on effective trust fund management and best practices in United States and Canadian apprenticeship programs. This conference will address the current and relevant issues that are impacting your program, providing the clarity you need to plan while learning from experts and sharing ideas.



Certificate in Global Benefits Management*

February 19-23, 2024 | Austin, Texas

From understanding the power of worldviews to defining your company strategies, the Certificate in Global Benefits Management provides the comprehensive knowledge needed to administer and manage a global benefits program.



Canadian Health and Wellness Innovations Conference*

February 26-28, 2024 | Victoria, British Columbia

The past couple of years have been some of the most volatile for multi-employer and public employee benefit plans. Explore new trends, share experiences and discover strategies to promote a complete culture of health.



Canadian Legal and Legislative Update*

May 15-16, 2024 | Halifax, Nova Scotia

Preconference: May 14, 2024

Learn about the most important legal developments and trends to help you protect your plan members and position your plan for a brighter future. Hear from industry experts and develop your understanding of the most critical legal issues in Canada.



Séminaire sur la gestion des caisses de retraite

May 23, 2024 | Montréal, Québec

Des poids lourds de l'industrie financière vous dévoileront leurs stratégies sur des enjeux tels que l'environnement, l'inflation et les événements sociopolitiques. Vous serez également mis au fait d'innovations et de tendances qui auront un fort impact sur la gestion de portefeuilles. Un rendez-vous obligé pour la communauté des professionnels de l'investissement au Québec.



Canadian Public Sector Pensions and Benefits Conference

June 18-19, 2024 | Calgary, Alberta

Discover innovative solutions to ensure the viability of your pension and health and welfare funds. Engaging sessions and open forums provide practical solutions to the unique challenges encountered by public sector plans.

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**Sponsorships are available.*

***Exhibits and sponsorships are available.*

EDUCATIONAL PROGRAMS

www.ifebp.org/education



Total Rewards Certificate

June 24-25, 2024 | Calgary, Alberta

Are you taking on new job responsibilities? Looking to upskill your knowledge on the latest total rewards practices? This certificate will teach you the fundamentals of designing, developing and implementing an effective and sustainable total rewards strategy.



EVOLVE Benefits and Workforce Strategies Summit**

June 25-27, 2024 | Calgary, Alberta

Attend this innovative conference for Canadian human resources (HR), pensions and benefits leaders to learn the latest trends and strategies to attract, retain and support your ever-changing workforce.



Benefit Communication and Technology Institute

July 15-16, 2024 | Denver, Colorado

Virtual option available

This conference will bring attendees up to speed on the latest requirements, current trends and best practices for communicating their plans. Also covered are the tools needed to evaluate an existing communication program, ensuring that plans are meeting their objectives and employees are engaged in their benefit offerings.



CONNECT Global Employee Benefits and Workforce Strategies Summit**

July 22-24, 2024 | Chicago, Illinois

Multinational benefits professionals will learn current trends and challenges in managing global benefits at impactful, expert-led sessions, panels and roundtable discussions. Network and engage with global benefits experts and peers in the industry to learn the latest best practices.

**Sponsorships are available.*

***Exhibits and sponsorships are available.*



Canadian Investment Institute

August 19-21, 2024 | Vancouver, British Columbia

Attendees will gain valuable insights and actionable solutions to positively change portfolio performances.



43rd Annual ISCEBS Employee Benefits Symposium

September 15-18, 2024 | Nashville, Tennessee

Learn from industry colleagues, experts and leaders during this can't-miss event for corporate benefits professionals, benefits consultants, fund administrators and public plan employees.



57th Annual Canadian Employee Benefits Conference

November 24-27, 2024 | San Antonio, Texas

Preconference: November 23, 2024

This must-attend conference provides comprehensive education on pensions, benefits and HR/general issues for Canadian multi-employer fund trustees, fund administrators, accountants, public sector plan trustees, benefits consultants, actuaries and investment managers.

Visit www.ifebp.org/schedule for a full list of our educational programs.

57TH ANNUAL CANADIAN EMPLOYEE BENEFITS CONFERENCE



November 24-27, 2024

Grand Hyatt San Antonio | San Antonio, Texas



Through life milestones, economic turns and unexpected events, the one item that will never falter is the solid education you will get at the Annual Canadian Employee Benefits Conference. Plan now to attend so you can be ready for your plan participants when it matters.



The Certified Employee Benefit Specialist® (CEBS) designation delivers professional expertise supported by research-based best practices with a curriculum developed by Dalhousie University. You can rely on CEBS for the knowledge you need to tackle challenges you will face throughout your career in benefits.

To earn your CEBS, you will successfully complete all five courses: GBA 1, GBA 2, RPA 1, RPA 2 and GBA/RPA 3. Earn your Group Benefits Associate (GBA) or Retirement Plans Associate (RPA) designation by completing three courses indicated below.

CEBS Designation

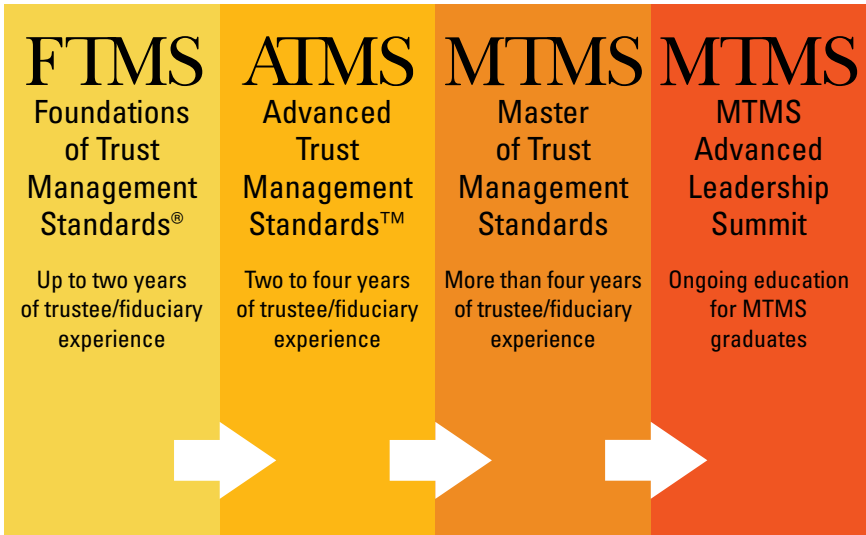


How CEBS Works

<p>Required (per course)</p>	<p>Exam—Successfully complete a two-hour comprehensive exam containing up to 85 multiple-choice questions.</p>
<p>Essential</p>	<p>Study Guide—Exam material is based on the content presented in the Study Guide. It includes print and digital materials and access to the online practice exam.</p> <p>Textbook—A textbook and/or supplementary readings are required for each course. These provide the theory and content of the topics covered in the Study Guide.</p>
<p>Additional Study Support</p>	<p>Online Study Group With Instructor Support—Need a little push to stay on track or the security of expert and peer support? These Study Groups are for you. Online Study Groups provide access to instructors, a structured time frame and peer interaction.</p>

EDUCATION PATH FOR CANADIAN TRUSTEES

Integrated, assessment-based education—Foundations of Trust Management Standards (FTMS), Advanced Trust Management Standards (ATMS) and Master of Trust Management Standards (MTMS)—offers trustees/fiduciaries a clear, cohesive training path.



EDUCATION PATH PROGRAMS—2024 DATES AND LOCATIONS

Foundations of Trust Management Standards (FTMS®)

June 16-17, 2024 | Calgary, Alberta

November 22-23, 2024 | San Antonio, Texas

Advanced Trust Management Standards (ATMS™) Sessions A and B

June 16-17, 2024 | Calgary, Alberta

August 17-18, 2024 | Vancouver, British Columbia

November 22-23, 2024 | San Antonio, Texas

Master of Trust Management Standards (MTMS) Sessions A and B

June 20-21, 2024 | Calgary, Alberta

November 22-23, 2024 | San Antonio, Texas

MTMS Advanced Leadership Summit

November 24, 2024 | San Antonio, Texas

E-Learning Courses and Online Certificates

www.ifebp.org/onlinecertificates

Online certificates provide the necessary training for anyone who administers or manages group benefits or pensions. Developed by industry experts, each certificate includes four e-learning courses that deliver top-quality instruction in a convenient, self-paced format. E-learning provides a solid foundation for continuing your professional development through CEBS and other programs.

Fundamentals in Group Benefits

Learn what insurance is, why it is needed and the common benefits provided under group benefits plans. Differentiate between the plan sponsor's and insurer's roles and understand the responsibilities regarding the management of a group benefits plan, including plan design, funding, pricing, claims and premium administration, participant communication and the renewal rating process.

Four courses must be taken in the following order to successfully complete the certificate:

- 1. The Group Insurance Landscape**
- 2. Group Benefits Design and Administration**
- 3. Group Benefits Funding and Pricing**
- 4. Life Cycle of a Group Benefits Plan.**

See page 12 for course descriptions. C\$342 (C\$532 nonmembers) Item #ELB1.

Fundamentals in Retirement Plans

Gain a solid understanding of what retirement income needs are and how retirement plans work to meet those needs. Learn about the various types of registered and nonregistered pension and savings plans, and take a deep dive into the intent and application of the Capital Accumulation Plan (CAP) Guidelines and the Canadian Association of Pension Supervisory Authorities (CAPSA) governance guidelines.

Four courses must be taken in the following order to successfully complete the certificate:

- 1. The Retirement Landscape**
- 2. Employer-Sponsored Retirement Plans**
- 3. Retirement Plan Sponsor Responsibilities**
- 4. Life Cycle of a Group Retirement Plan.**

See page 13 for course descriptions. C\$342 (C\$532 nonmembers) Item #ELB2.

Take all four Fundamentals in Group Benefits or Fundamentals in Retirement Plans courses to earn a certificate—or take the courses individually. And remember, International Foundation members get a discount!

E-Learning Courses and Online Certificates

www.ifebp.org/canadianelearning



The Group Insurance Landscape

One-Credit Course

Learn what insurance is, why it is needed and the common benefits provided under group benefits plans. This course focuses on the relationships among the parties of a group insurance contract—the plan sponsor, insurer, plan advisors and plan members.

C\$90 (C\$140 nonmembers)



Group Benefits Design and Administration

One-Credit Course

This course outlines the plan sponsor's role in group benefits plan management and provides an overview of key requirements related to group benefits design, claims administration, premium administration, recordkeeping and communication.

C\$90 (C\$140 nonmembers)



Group Benefits Funding and Pricing

One-Credit Course

This course describes the traditional funding methods used for group benefits plans, the factors that impact a plan sponsor's choice of funding method and the basic methods of pricing group insurance. It also includes an overview of factors that insurers consider in the renewal rating process.

C\$90 (C\$140 nonmembers)



Life Cycle of a Group Benefits Plan*

One-Credit Course

Understand the insurer's role and responsibilities at all stages of a group benefits plan life cycle—prospecting, quoting/selling, implementing, servicing, renewing and terminating. Ethical decision making is examined from the perspectives of all parties involved.

C\$90 (C\$140 nonmembers)

E-learning courses qualify for CEBS Compliance credit.

Insurance professionals licensed in Alberta, British Columbia, Manitoba, Saskatchewan and Ontario can use Canadian e-learning courses to meet continuing education requirements. Please see www.ifebp.org/education/elearningcourses/ce/Pages/default.aspx for more information.

**This course is available to all individuals. It is, however, designed to complete the curriculum for those who work for a member company of CLHIA and need to meet the Proficiency Standards.*

E-Learning Courses and Online Certificates

www.ifebp.org/canadianelearning



The Retirement Landscape

One-Credit Course

Gain a basic understanding of what retirement income needs are and how retirement plans work to meet those needs. This course introduces the three pillars of the retirement system and outlines the key characteristics and the prevalence of registered and nonregistered plans. C\$90 (C\$140 nonmembers)



Employer-Sponsored Retirement Plans

One-Credit Course

This course provides an overview of benefits arising from a registered pension plan on retirement, termination of employment or death. It examines various types of defined benefit registered pension plans and nonregistered savings plans and explains the pros and cons for employees and employers. C\$90 (C\$140 nonmembers)



Retirement Plan Sponsor Responsibilities

One-Credit Course

This course provides a detailed explanation of the Capital Accumulation Plan (CAP) Guidelines and the Canadian Association of Pension Supervisory Authorities (CAPSA) governance guidelines. It reviews their significance for plan sponsors, plan members and insurers and highlights key differences between the two. C\$90 (C\$140 nonmembers)



Life Cycle of a Group Retirement Plan*

One-Credit Course

Understand the insurer's role and responsibilities at all stages of a capital accumulation plan (CAP) life cycle—prospecting, quoting/selling, implementing, servicing and terminating. Ethical decision making is examined from the perspectives of all parties involved. C\$90 (C\$140 nonmembers)

The International Foundation would like to acknowledge the Canadian Life and Health Insurance Association (CLHIA) and the member companies of CLHIA for sharing their vision and expertise in working with Dalhousie University, and for their financial support to develop the courses.

**This course is available to all individuals. It is, however, designed to complete the curriculum for those who work for a member company of CLHIA and need to meet the Proficiency Standards.*

CUSTOMIZED EDUCATION FOR YOUR TEAM

www.ifebp.org/onsite-education

Our training solutions are as unique as your organization. We can bring education to your organization, on your schedule and in your preferred format.



IN PERSON

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. Choose from a variety of e-learning courses that can be housed on your internal LMS for easy tracking and grading.



WEBCASTS

A series of webcasts is a cost-effective and convenient way to train staff wherever 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.

INTERNATIONAL FOUNDATION MEMBERSHIP HELPS YOU LEARN MORE

www.ifebp.org/membership

The International Foundation covers trending topics, breaking compliance updates and legislative updates. Our resources will help you:



STAY COMPLIANT

Legislative and Regulatory Updates

Find vetted, expertly curated updates on issues impacting the pensions and benefits landscape.

www.ifebp.org/legislative

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 Centre

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. Visit www.JobsInBenefits.com to explore more.

Community

Chat directly with your peers, and learn from others' conversations at www.ifebp.org/community.



SAVE TIME

InfoQuick

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

Sample Documents

Enough starting from scratch—View sample policies, forms, RFPs, checklists and other documents first.

Personalized Research Service

Save hours of time by letting one of our information specialists handle your complicated pension and benefit 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. Visit www.ifebp.org/webcasts for a full listing.

Plans & Trusts Magazine

Understand emerging trends affecting pension and benefit plans through best practices, case studies and expert analysis, delivered to your door.

www.ifebp.org/magazines

Plus, enjoy extra perks like discounts on educational events, benchmarking data on hot topics and resource pages for a deeper topic-specific dive!

Stay compliant and informed on issues impacting your employees/plan participants. The Foundation has information on these topics and more.

- Pension funding
- Adoption assistance benefits
- Surrogacy benefits
- Pension plan statement of investment
- Policies and procedures
- Pay equity
- Pay transparency
- Overtime pay
- Mental health
- Fertility treatment benefits
- Financial wellness
- Paid time off
- Leaves of absence
- Recruitment and retention
- Maternity and parental benefits
- Lifestyle spending accounts