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2020
EMPLOYEE BENEFITS BOOK CATALOG

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General Benefits

Create Your Own Employee Handbook: A Legal & Practical Guide for Employers
Lisa Guerin, J.D., and Amy DelPo, J.D.

$49.99 members ($52.50 nonmembers)

This book provides everything business owners, managers and human resources professionals need to create or update an employee handbook. It includes the latest legal information, practical suggestions and best practices on wages, hours and tip pools; at-will employment; time off; discrimination and harassment, complaints and investigations; health and safety; drugs and alcohol; workplace privacy; and email and social media. This edition covers recent updates to state and federal laws, including rules on paid family leave, changes in the wake of #MeToo and more. All policies and forms are downloadable from a unique webpage. (Nolo)

433 pages. 2019. Item #9158

Education Benefits: 2019 Survey Results

Free to members. ($50.00 nonmembers)

This report evaluates the prevalence of educational benefit offerings from corporations and public employers across the United States. The report reveals different trends, insights and benchmarking data for tuition reimbursement plans, student loan repayment assistance, program requirements and limitations, and organizational motivations and measurements. Information includes data on types of benefits offered, eligible employee groups, types of coursework covered, academic and payback requirements, reasons for offering education benefits, program challenges and barriers, program success and more. (International Foundation)

37 pages. 2019. Item #8102E
Available as an e-book only.
Employee Benefits Glossary, 13th Edition

$49.00 members ($65.00 nonmembers)

This practical, comprehensive glossary includes over 4,000 terms commonly used by employee benefits trustees and professionals. Inside this 13th edition, you’ll find user-friendly explanations, examples drawn from real-world situations and extensive cross-referencing that covers a broad range of topics, including compensation, employee benefits design, funding and administration, government regulations and legislation, labor relations and much more.

(International Foundation)

272 pages. 2016. Item #7570

Employee Benefits Survey: 2018 Results

$75.00 members ($125.00 nonmembers)

This report is the sixth in a series examining employee benefit offerings from corporations, public employers and multiemployer benefit plans across the United States. The report reveals different trends, insights and benchmarking data for pension and retirement plans, health care benefits and other benefits such as life insurance, vacation, sick time, paid time off, and short- and long-term disability. Survey results provide data on defined benefit and defined contribution plans; financial education and retirement planning; health care coverage and arrangements; and benefits for prescription drugs, dental, vision, wellness and mental health. Data on work/life benefits and executive perks is included as well. (International Foundation)

76 pages. 2018. Item #8065E
Available as an e-book only.
General Benefits

The Essential Guide to Family & Medical Leave
Lisa Guerin, J.D., and Attorney Deborah C. England

$49.99 members ($52.50 nonmembers)
A plain English guide to the Family and Medical Leave Act (FMLA), this book provides detailed information, sample forms and tools that cover every aspect of FMLA. The guide will help employers determine whether they are covered by the law, who is eligible for leave, what types of leave are covered and more. (Nolo)

436 pages. 2018. Item #9128

Flexible Work Arrangements: 2017 Survey Results

Free to members. ($50.00 nonmembers)
This report examines the current status, approach, impact and policies of organizational flexible work arrangements of corporations and public employers in the United States. The report details responses on flexible work arrangements including compressed workweeks, flexible work hours, job sharing, part-time hours, seasonal work, summer hours and telecommuting/working remotely. (International Foundation)

34 pages. 2017. Item #7969E
Available as an e-book only.
Long-Term Care: How to Plan & Pay for It
Attorney Joseph L. Matthews

$29.99 members ($31.50 nonmembers)

This straight-talking guide will help readers understand the full range of options available—from home care and assisted living to nursing homes and hospices. Practical yet sensitive advice is offered on choosing the right type of long-term care, facilities and payment options. Author and attorney Joseph L. Matthews explains how to protect assets and get the most out of government programs such as Medicare, Medicaid and veterans benefits. (Nolo)

364 pages. 2018. Item #9157

Paid Leave in the Workplace: 2017 Survey Results

Free to members. ($50.00 nonmembers)

This survey report examines the current trends for paid leave offerings provided to workers and participants by corporations and public employers in the United States. The report reveals the most common types of paid leave policies, including paid holidays, paid-time-off (PTO) plans, paid vacation, sick leave, bereavement leave, parental leave and sabbaticals. (International Foundation)

General Benefits

Transportation Benefits and Incentives: 2017 Survey Results

Free to members. ($50.00 nonmembers)

This survey report examines trends and policies for transportation benefits and incentives provided by corporations and public employers in the United States. The report details responses on utilized modes of transportation; reasoning behind transportation choices; parking for workers; benefits and incentives to encourage employees to utilize different forms of transportation; and policies on walking/biking, mass transportation and carpooling. (International Foundation)

29 pages. 2017. Item #7990E
Available as an e-book only.

Coming soon!
Workplace Emergency Preparedness Survey: 2020 Results
Item #8171E
2019 Health Savings Accounts Facts
Whitney Richard Johnson, Esq.

$183.00 members ($192.50 nonmembers)

An explosion has occurred in the number of high-deductible health plans (HDHPs) combined with health savings accounts (HSAs). Turn to this book for updated answers to over 800 questions concerning HSA eligibility, contributions, transfers and rollovers, HSA deductions, tax reporting, comparability testing, testing periods and compliance, regulatory materials, and HSA worksheets and forms. This edition has been revised to reflect changes in HSA rules and regulations and includes inflation-adjusted numbers for HSA limits as well as numerous charts, graphs and checklists that clearly illustrate key topics. (National Underwriter)

387 pages. 2019. Item #9138

2019 Healthcare Reform Facts
Michael D. Thomas, J.D.

$194.00 members ($204.00 nonmembers)

The book provides answers to hundreds of questions frequently asked by employers and their advisors concerning the Affordable Care Act (ACA). This reference book addresses implementation, compliance and tax implications of health care reform. The topics covered include the effective dates of various penalties, types of health insurance affected by health care reform, the employer mandate, required information reporting, tax incentives for offering health insurance and many more. New additions cover short-term limited duration health insurance plans, changes in how individual health insurance tax credits are calculated, Medicaid expansion update and analysis, and more. (National Underwriter)

582 pages. 2019. Item #9139
Health

Cathye L. Smithwick

$55.00 members ($70.00 nonmembers)
Plan sponsors, dental benefit staff, benefit consultants, insurance brokers and others will all find valuable information and insight in this popular primer concerning dental benefits. This reference book addresses how dental benefits are different from medical benefits, benefit plan design and pricing, choosing a dental plan and plan administrator, coordinating dental and medical care, and much more. The book is especially useful for those who understand medical benefits but are new to dental or for those who understand dental practice but would like to learn more about the benefits side of the business. (International Foundation)

587 pages. 2012. Item #6979

HIPAA Privacy for Health Plans After HITECH
Reinhart Boerner Van Deuren

$110.00 members ($129.00 nonmembers)
This is a helpful manual to help group health plan sponsors remain in compliance with the privacy obligations under HIPAA. Accompanying the print manual (a three-ring binder) is a CD with model policies, procedures, notices, a breach log and business associate agreement. This manual, reflecting the 2013 regulations of HITECH, is designed as a tool to help plan sponsors with their HIPAA privacy compliance obligations. (Reinhart Boerner Van Dueren)

257 pages. 2013. Item #8950
Mental Health and Substance Abuse Benefits: 2018 Survey Results

Free to members. ($50.00 nonmembers)

This International Foundation survey report examines the types of mental health/substance abuse benefits offered by member corporations, multiemployer trust funds and public employers/governmental entities in the United States and Canada. The report includes information on prescription drug abuse, employee assistance programs and mental health conditions covered. It also examines the prevalence of mental health/substance abuse issues among plan participants and their family members, while looking at the impact these issues have on the workforce and on health care costs. Barriers to implementing mental health/substance abuse initiatives also are discussed. (International Foundation)

91 pages. 2018. Item #8058E
Available as an e-book only.

Self-Funding Health Benefit Plans

John C. Garner, CEBS

$145.00 members ($190.00 nonmembers)

This in-depth guide is for plan sponsors, attorneys and other professionals seeking insight when making decisions concerning the creation and administration of self-funded health benefit plans. Chapters cover a broad range of topics such as regulatory compliance and fiduciary responsibility, risk management and stop-loss coverage, accounting and audits, subrogation, cost containment, investment of cash reserves and more. (International Foundation)

264 pages. 2015. Item #7563
Wellness

Shared Values—Shared Results
Dee W. Edington, Ph.D. and Jennifer S. Pitts, Ph.D.

$29.95 members ($31.45 nonmembers)
This book combines the concepts of business economics and a sustainable culture of health to take workplace wellness to the next level. Popular author of the book Zero Trends: Health As a Serious Economic Strategy, Dee Edington, Ph.D., and co-author Jennifer Pitts, Ph.D., give fresh thoughts on developing a win-win organizational philosophy to promote employee health and well-being. (Edington Associates)

387 pages. 2016. Item #9085

Workplace Wellness That Works
Laura Putnam

$35.00 members ($36.75 nonmembers)
This book gives instruction on how to design a smarter workplace wellness strategy that truly makes a difference in employees’ lives—and your organization’s bottom line. The author, a wellness consultant, illustrates why true health and well-being cannot be mandated but must be pursued voluntarily. She offers a ten-step path to creating and implementing an innovative wellness program. Besides thoughtful tips for generating leadership engagement, she also suggests ways to “sneak” wellness-related elements into organizational development. (Wiley)

315 pages. 2015. Item #9058
Workplace Wellness Trends: 2019 Survey Report

Free to members. ($50.00 nonmembers)

Workplace Wellness Trends examines wellness offerings and policies based on responses from 619 organizations representing corporations, multiemployer plans and public employee plans across the United States and Canada. Findings include offerings, prevalence, budget, communication of offerings, incentives, sources used to plan programs, barriers to wellness, and return on investment (ROI) and value on investment (VOI).

(International Foundation)

138 pages. 2019. Item #8133E
Available as an e-book only.
Ready or Not: Your Retirement Planning Guide, 47th Edition
International Foundation and Elizabeth M. McFadden

$16.95 members ($19.95 nonmembers)
Quantity discounts begin at five copies.

A practical guide that will help employees prepare for a satisfying and comfortable retirement. Besides encouraging workers to save, this book will help them make the sometimes difficult and confusing choices concerning when, where and how to retire. This full-color edition includes new content on the challenges facing today’s workforce, like student debt repayment, retirement planning in a gig economy and caregiving for family members. (International Foundation)

160 pages. 2020. Item #8164

Your Pension and Your Spouse—The Joint and Survivor Dilemma, Eighth Edition
R. George Martorana

$12.00 members ($16.00 nonmembers)
Quantity discounts available.

This helpful workbook provides step-by-step guidelines for married employees in a defined benefit pension plan who must decide between an employee-only annuity and a joint and survivor annuity that pays pension benefits during an employee’s lifetime as well as during the lifetime of a surviving spouse. Income and expense worksheets will help the user evaluate how much money is needed for retirement. Tables on life expectancy and lump-sum pension values are handy tools that will also help with the decision-making process. (International Foundation)

24 pages. 2020. Item #8119
IRA and Retirement Plan Quickfinder Handbook, 2019 Edition
Thomson Reuters

$57.00 members ($59.95 nonmembers)

The tax rules for IRAs and retirement plans can be confusing, often differing from plan to plan with important amounts changing from year to year. This handbook provides quick answers to questions involving eligibility, making contributions, elective deferrals, how distributions are taxed, penalties and more. (Thomson Reuters)

2019. Item #9152

IRAs, 401(k)s & Other Retirement Plans
Twila Slesnick, Ph.D., and Attorney John Suttle, CPA

$34.99 members ($36.75 nonmembers)

This book offers readers best practices for taking money out of retirement plans. It explores profit-sharing plans, stock bonus plans, money purchase pension plans, defined benefit plans, target benefit plans, Keogh plans and individual retirement accounts (IRAs), among others. The book also provides access to a designated web page that allows readers to stay current on legal updates and important information regarding retirement plans. (Nolo)

395 pages. 2019. Item #9150
Get the Most Out of Retirement
Sally Balch Hurme

$19.95 members ($20.95 nonmembers)
Part of the ABA/AARP Checklist series, this book is subtitled Checklist for Happiness, Health, Purpose, and Financial Security. Guiding readers through various steps of retirement, this book addresses working with employees to transition out of careers; managing retirement plans and benefits; reviewing insurance policies; and organizing medical, financial and legal records. It also covers topics such as envisioning retirement, adjusting to new and current relationships, deciding where to live, and taking care of mind and body. The book includes checklists and sample documents to serve as personal and legal resources. (American Bar Association)

294 pages. 2017. Item #9119

Social Security, Medicare & Government Pensions
Attorney Joseph Matthews

$29.99 members ($31.50 nonmembers)
Get the most out of your retirement and medical benefits. Navigate the complex and often daunting Social Security and Medicare systems using the resources and information in this guide. This edition includes information on the end of the “doughnut hole” for brand-name prescription drugs, updated benefit numbers for Social Security and Medicare, and new Medicare Advantage features and enrollment provisions. (Nolo)

496 pages. 2019. Item #9141
U.S. Public Pension Handbook  
Von M. Hughes  
$85.00 members ($89.25 nonmembers)  
Limited internal resources, increasing portfolio complexity and the macroeconomic trends of global aging and increased regulation are just a few of the challenges that make managing a public pension more difficult than ever. This book provides a thorough look at pension governance and design, investment process and management, pension accounting and the relevant legal framework governing the fiduciary responsibility of trustees.  
(McGraw Hill)  
475 pages. 2019. Item #9156

One of a Kind! A Practical Guide for 21st Century Public Pension Trustees  
Frederick Funston and Randy Miller  
$49.50 members ($52.00 nonmembers)  
This one-of-a-kind book offers practical advice concerning the governance challenges faced by public pensions—written by those with deep and broad experience as public plan trustees and executives. The book clarifies the role of the board of directors providing direction, oversight and prudent delegation to committees as well as executive management. It provides a sensible and comprehensive perspective on leading practices and lessons learned that can be applied to meet the unique requirements of each plan.  
(Funston Advisory Services, LLC)  
417 pages. 2017. Item #9104
The Tools & Techniques of Investment Planning
Stephan R. Leimberg, Thomas R. Robinson and Robert R. Johnson

$188.00 members ($197.40 nonmembers)
Created for the investment professional as well as the novice, this reference book is organized by asset classes. It provides practical insights into the strengths and weaknesses of various investment approaches and asset classes. The book contains an introductory chapter that emphasizes a process orientation to investment planning. Net investment income tax (NIIT) is explored, including its applicability to trusts and estates. Examples offer detailed information about real-world investment scenarios to help readers understand how investment performance is achieved and monitored. Appendixes provide time value charts, an investment characteristics matrix and other helpful tools. There also is a glossary of investment terms. (National Underwriter)

637 pages. 2017. Item #9099

The Trustee Governance Guide: The Five Imperatives of 21st Century Investing
Christopher K. Merker and Sarah W. Peck

$37.99 members ($39.89 nonmembers)
Focusing on the critical aspects of governance, knowledge, diversification, financial performance and impact, this book provides a guide to 21st century investing for boards of trustees. The book addresses questions such as: What is good governance? How do we know it when we see it? Why does it matter? How much knowledge is necessary to be a competent board member? What are the key elements of a diversified portfolio? How much does cost matter? What's the difference between socially responsible and ESG investing? Can I focus on sustainability and still be a good fiduciary? (Palgrave MacMillan)

136 pages. 2019. Item #9155
International Foundation and Horizon Actuarial Services, LLC

Free to members. ($195.00 nonmembers)
This survey report examines 1,560 multiemployer health plans in the United States, summarizing and analyzing key trends in demographics, benefit costs, income, cash flows and asset values over the ten-year period from 2007 through 2016. The report also separates and highlights differences between industries and geographic regions. (International Foundation)

90 pages. 2019. Item #8140E

International Foundation and Horizon Actuarial Services, LLC

Free to members. ($195.00 nonmembers)
This report breaks down data into two separate tracks: one for multiemployer defined benefit (DB) pension plans and the other for multiemployer defined contribution (DC) plans. The report takes a look at a 15-year period (2002-2016) to focus on key trends in demographics, cash flows, investments, funding, costs and contributions for multiemployer DB pension plans and multiemployer DC plans in the United States. (International Foundation)

103 pages. 2019. Item #8126E
Lawrence R. Beebe and Philip Vivirito

$29.00 members ($39.00 nonmembers)
This book is considered the payroll audit bible, with a wealth of practical information and advice on how to conduct payroll audits and audit programs that are both effective and cost efficient. Throughout the book are answers to questions often asked by trustees, employers and payroll auditors. (International Foundation)

154 pages. 2013. Item #7303

Collecting Employer Contributions: The ERISA Litigation Guide
Travis J. Ketterman

$25.00 members ($36.00 nonmembers)
Use this step-by-step guide to filing a collections suit under ERISA. Trustees will appreciate the plain English used to explain the collection process. Trust fund attorneys will value the practical pointers that can help increase the likelihood of a positive outcome. The appendix contains nearly 200 pages of sample legal forms and other model documents common to the collection of employer contributions.

306 pages. 2009. Item #6474

Purchase the pair and save!
Payroll Audit/Collections Combo
$45.00 members ($70.00 nonmembers)
Item #7303K
Top Trends in Apprenticeship Programs: 2020 Survey Results

Free to members. ($50.00 nonmember)

This survey report examines the current status, approach, impact and policies of apprenticeship training and education programs in a number of industries across the United States and Canada. The study details responses on challenges facing programs and apprentices, recruitment and retention initiatives, life skills initiatives (including financial literacy), mental health issues, program communication strategies, instructor quality initiatives and program partnerships. (International Foundation)

2020. Item #8188E
Available as an e-book only.


Lawrence R. Beebe

$75.00 members ($110.00 nonmembers)
Quantity discounts begin at ten copies.

The essential reference tool for trustees, administrators and others who serve multi-employer benefit plans, this book includes a collection of practical chapters covering topics such as fiduciary responsibility, plan design and financing, plan administration, liability insurance, investment management and more. The types of plans covered include pension and retirement, health and welfare, and apprenticeship. (International Foundation)

529 pages. 2017. Item #7761
Financial Education and Planning


Free to members. ($50.00 nonmembers)

This survey analysis examines data from the International Foundation’s report Financial Education for Today’s Workforce: 2016 Survey Results to determine whether organizations with financial education are experiencing better outcomes in their participant populations compared with those not offering financial education. (International Foundation)

18 pages. 2017. Item 7877E
Available as an e-book only.

Financial Education for Today’s Workforce: 2018 Survey Results

Free to members. ($50.00 nonmembers)

This survey report examines various types of retirement and financial education offerings provided to employees and participants by corporations, multiemployer trust funds and public employers/governmental entities across the United States and Canada. The report reveals different trends, methods, goals, obstacles, budgets and measurements for retirement and financial education initiatives. It also includes information on participation and contribution rates and types of retirement plans offered. The report provides breakdowns by organization type and country. (International Foundation)

108 pages. 2018. Item #8041E
Available as an e-book only.

Port Jobs

$12.95 members ($13.60 nonmembers)

This user-friendly book is actually a money management workbook designed specifically for apprentices to help them prepare for their apprenticeship experience and the potential layoffs that are often part of working in a trade, manage money using spending plans, understand credit and build a good credit history, and deal with debt. Drawing on the real-life experiences of apprentices, the guide offers checklists and worksheets to motivate and help users take charge of their financial futures. Quantity discounts start at 20 copies. (Port Jobs)

66 pages. 2015. Item #9103

Financial Tools for the Trades: Trainer Toolkit

Port Jobs

$150.00 members ($157.50 nonmembers)

This tool kit includes everything an instructor needs to teach Financial Tools for the Trades to apprentices, including four personal finance lessons, four ready-made PowerPoint presentations on a thumb drive, and suggestions of how to find a local bank or credit union to partner with the program and help you teach the class. It also includes an instructor’s script and practical tips for teaching apprentices about money management. Two copies of the book Financial Tools for the Trades: A Survival Guide for Apprentices are included in the tool kit. (Port Jobs)

2015. Item #9101
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