

# 2019 Trustees and Administrators Institutes

June 24-26, 2019  
Hilton San Francisco Union Square  
San Francisco, California



Advanced Trustees and Administrators Institute

New Trustees Institute—  
Level I: Core Concepts



## PROGRAM AT A GLANCE

<b>One-Day Preconference Session</b>	<b>Sunday, June 23, 2019</b> 8:00 a.m.-1:00 p.m.	<b>Diversity Training—Foundations for an Effective Diverse Team</b>
	<b>Monday</b>	
<b>New Trustees Institute—Level I: Core Concepts</b> June 24-26, 2019	7:30-11:30 a.m.	<b>Trustee Responsibility and Legal Environment</b>
	12:30-4:30 p.m.	<b>Overview of Retirement Plans</b>
	<b>Tuesday</b>	
	7:30-11:30 a.m.	<b>Overview of Health and Welfare Plans</b>
	12:30-4:30 p.m.	<b>Investing Health and Welfare and Pension Assets</b>
	<b>Wednesday</b>	
	7:30-11:30 a.m.	<b>Governance</b>
	<b>Monday</b>	
<b>Advanced Trustees and Administrators Institute</b> June 24-26, 2019	7:30-8:45 a.m.	<b>Economic Update</b>
	9:00-10:15 a.m.	<b>Legislative Update—Retirement Funds Understanding Your Insurance Options</b>
	10:30-11:45 a.m.	<b>Legislative Update—Health Funds Properly Communicating Retirement Options</b>
	1:15-2:30 p.m.	<b>The Changing Health Care Environment Tackling Prohibited Employment</b>
	2:45-4:00 p.m.	<b>What to Do About Cybersecurity</b>
	<b>Tuesday</b>	
	7:30-8:45 a.m.	<b>Pharmacy Benefits Payroll Audits and Delinquencies</b>
	9:00-10:15 a.m.	<b>Handling the Opioid Epidemic The Challenges of Withdrawal Liability</b>
	10:30-11:45 a.m.	<b>Mental Health Running Effective Trust Fund Meetings</b>
	1:15-2:30 p.m.	<b>Ancillary Benefits Options Advice on How to Handle Your DOL/IRS Audits Effective Trust Fund Administration</b>
	2:45-4:00 p.m.	<b>Guided Open Forum—Trustees Guided Open Forum—Administrators Changes in Retiree Health</b>
	<b>Wednesday</b>	
	7:30-8:45 a.m.	<b>What to Expect From Your Investment Consultants and Managers</b>
	9:00-10:15 a.m.	<b>The Trustee-Administrator Relationship</b>
	10:30-11:45 a.m.	<b>Auditing the Auditor</b>

# 2019 Trustees and Administrators Institutes

Nearly a thousand trustees, administrators and plan professionals gather each year to attend one of the institutes. The consistent attendance over the years speaks to the importance of the issues facing the benefits world and to the quality education provided by the International Foundation. Don't miss this time-honored educational event. Developed by active trustees, administrators and professional advisors, each session is designed to address the issues you face today and prepare you for what lies ahead. In these challenging times, you can count on the International Foundation to deliver timely, relevant and balanced education on the trends, issues and future direction of the industry. Register today!

## Who Should Attend

### **One-Day Preconference: Diversity Training—Foundations for an Effective Diverse Team**

Designed for trustees, administrators and plan professionals

### **Main Conference: New Trustees Institute—Level I: Core Concepts**

Designed for multiemployer trustees who have served for less than two years or who have not previously attended an International Foundation educational program

### **Main Conference: Advanced Trustees and Administrators Institute**

Designed for experienced trustees (who have served three or more years and completed the New Trustees Institute—Level I: Core Concepts) and administrators (salaried and TPA) of all experience levels

## Why You Should Attend

- Learn from industry experts about the current state of affairs and latest reform initiatives—Be prepared for what lies ahead.
- Network with peers who face similar challenges—Learn from their mistakes, benchmark your performance, and take away workable ideas and solutions to implement.
- Bring home helpful resource materials to share with colleagues—from sample documents to checklists and case studies. The value of your attendance will continue long after you've left the program.



If you take your role seriously, you need to go!

**Eric Gray**  
Director  
Dayton Electrical JATC



# Diversity Training— Foundations for an Effective Diverse Team

Sunday, June 23, 2019 | 8:00 a.m.-1:00 p.m.

This workshop focuses on building a strong foundation of core competencies upon which more advanced skills can be developed. Identifying and defining key terms and concepts like diversity and culture are vital components of the workshop. Participants will have the opportunity to learn about how culture influences interpersonal interactions as well as business decisions. As a way of leveraging the growing diversity of our communities as assets, participants will learn more about some of the significant cultural differences that are not often discussed, understood or fully appreciated. Specific strategies to utilize in day-to-day interactions to improve cross-cultural interactions will also be presented.

## Who Should Attend?

This workshop is designed for all those who wish to contribute to creating a positive atmosphere within their work environment. With changing demographics and multiple generations in the workforce, everyone benefits from having a high level of cultural competence.

## Learning Objectives

- Provide shared meaning of key concepts and terms related to cross-cultural team building.
- Understand the core components of developing greater intercultural fluency.
- Understand how diversity and inclusion improve work-team performance.
- Learn proven techniques to create spaces that invite sharing and discovery.
- Identify tools to assist in developing cross-cultural effectiveness.

## Workshop Leader



### **Nehrwr Abdul-Wahid**

Lead Consultant  
One Ummah Consulting  
Fridley, Minnesota

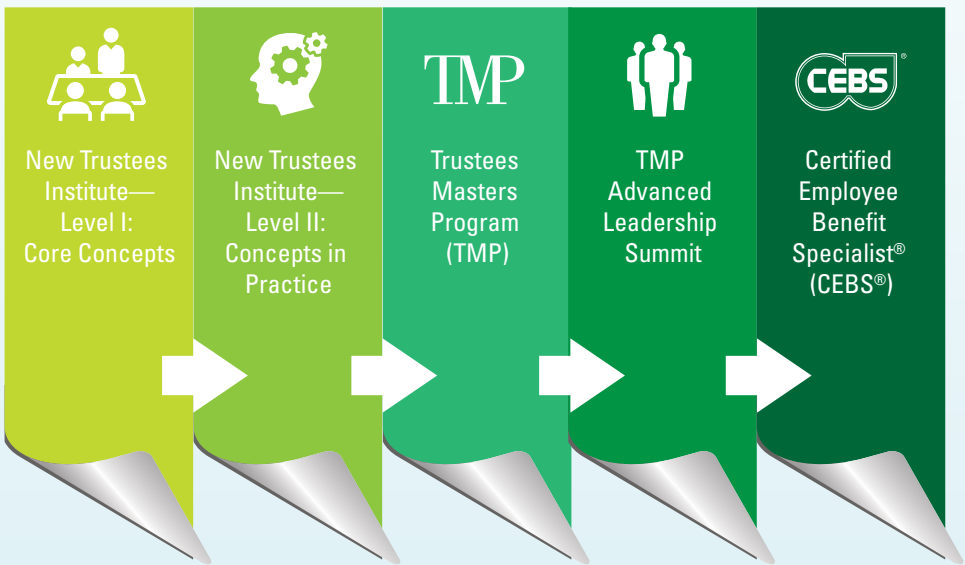
***Separate registration  
fee required.***

# Recommended Education Path for Multiemployer Trustees

Making informed decisions is a key component to the success of a multiemployer trust fund. Trustees must understand a wide range of issues—complex regulations, legislation, health care systems and investment strategies. Education about these topics is crucial.

In order to help trustees meet their educational needs, the International Foundation offers a wide range of courses and conferences. In order to help determine which program fits your needs, we have created a recommended educational path.

## U.S. Multiemployer Trustee Education Path



For more information about these programs and how you can progress through the suggested path visit [www.ifebp.org/trusteeath](http://www.ifebp.org/trusteeath).

# New Trustees Institute— Level I: Core Concepts

[www.ifebp.org/newtrustees](http://www.ifebp.org/newtrustees)

The New Trustees Institute—Level I: Core Concepts is designed for Taft-Hartley multiemployer plan trustees who have served for less than two years or who have not previously attended an International Foundation educational program. The New Trustees Institute is also ideal for collective bargaining and other personnel who work with trustees and who want a better understanding of their role and responsibilities.

## SUNDAY, JUNE 23, 2019

4:00-6:00 p.m.

### Registration/Exhibit Hall Open/Welcome Reception

*(Refreshments and light hors d'oeuvres will be served.)*

## MONDAY, JUNE 24, 2019

6:30 a.m.-4:30 p.m.

### Registration Open

6:30-7:30 a.m.

### Continental Breakfast/Exhibit Hall Open

7:30-11:30 a.m.

### Trustee Responsibility and Legal Environment **1** **1**

- History of benefits/legislation
- Relationship of trustees and parties to the collective bargaining agreement
- Governing documents
- Conducting effective trustee meetings
- Fiduciary responsibilities under ERISA

**Robert M. Projansky**, Partner, Proskauer LLP, New York, New York

**Peter M. Rosene, Esq.**, Attorney at Law, Shareholder, Reinhart Boerner Van Deuren sc, Minneapolis, Minnesota

11:30 a.m.-12:30 p.m.

### Lunch/Exhibit Hall Open

12:30-4:30 p.m.

### Overview of Retirement Plans **1** **1**

- Purpose and objectives
- Defined contribution and hybrid plans
- Actuarial concepts
- Accounting changes
- Administration
- Market performance
- Manage the money
- Legal and legislative developments
- Defined benefit pension plans
- The future of retirement

**Kelly Coffing, EA, FSA, MAAA**, Principal and Consulting Actuary, Milliman, Inc., Seattle, Washington

4:30-5:00 p.m.

### Networking Reception/Exhibit Hall Open

*(Refreshments and light hors d'oeuvres will be served.)*

# New Trustees Institute— Level I: Core Concepts

**TUESDAY, JUNE 25, 2019**

6:30 a.m.-4:30 p.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast/Exhibit Hall Open

7:30-11:30 a.m.

Overview of Health and Welfare Plans **i** **@**

- Overview of health and welfare programs
- Plan funding
- Plan design
- Administration and financing metrics
- Communication needs and requirements
- Data collection and analysis
- Cost-control initiatives
- Health care reform, legal/legislative developments

*Peter M. Rosene, Esq., Attorney at Law, Shareholder, Reinhart Boerner Van Deuren sc, Minneapolis, Minnesota*

*Dee Shaw, Associate Vice President, Employer Engagement and Strategy, City of Hope, Duarte, California*

11:30 a.m.-12:30 p.m.

Lunch/Exhibit Hall Open

12:30-4:30 p.m.

Investing Health and Welfare and Pension Assets **@**

- Investing process
- Investment terminology
- Risk and return
- Investment objectives and policy
- Asset classes
- Asset allocation
- Market performance
- Selecting managers and monitoring performance

*Troy Brown, CFA, Executive Director, AndCo Consulting, Orlando, Florida*

*Ian W. Jones, Senior Consultant, AndCo Consulting, Buffalo, New York*

**WEDNESDAY, JUNE 26, 2019**

6:30-11:30 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-11:30 a.m.

Governance **i** **@**

- Financial statements
- Internal controls
- Administration
- Documents, records and meeting minutes
- Working with plan professionals
- Defining a good trustee and how to become one
- Communication
- Best practices

*Christopher E. Brecht, GBA, RPA, Chief Executive Officer, Carday Associates, Columbia, Maryland*

*Lawrence R. Beebe, CPA, Partner, WithumSmith+Brown, PC, Bethesda, Maryland*

*David Evangelista, CPA, CGMA, Principal, MBAF Certified Public Accountants and Advisors, Valhalla, New York | New York, New York*

# Advanced Trustees and Administrators Institute

www.ifebp.org/trusteesadministrators

The Advanced Trustees and Administrators Institute is designed for experienced multiemployer trustees (those who have attended the New Trustees Institute and have served as trustees for more than three years) and administrators (salaried and contract) of all experience levels. All sessions will be open to both advanced trustees and administrators. Select sessions will also be open to those attending the concurrent Public Employee Benefits Institute and/or the Accounting and Auditing Institute for Employee Benefit Plans.

## SUNDAY, JUNE 23, 2019

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

*(Refreshments and light hors d'oeuvres will be served.)*

## MONDAY, JUNE 24, 2019

6:30 a.m.-4:30 p.m.

Registration Open

6:30-7:30 a.m.

Continental Breakfast/Exhibit Hall Open

7:30-8:45 a.m.

Economic Update  

You rely on investment returns and a strong labor market to help create a foundation for your benefit plans. This opening session will offer a snapshot of the current and future economic state to help you plan for the future.

- Current market conditions
- How our political environment is impacting economic performance
- Key economic indicators
- Workforce shortage—Demographics of the future

**Sandy Lincoln**, Chief Executive Officer, Lincoln Investment Perspectives, LLC,  
Lake Forest, Illinois

**Continuing Education Credit Recommendations** (Dependent on individual state approval)—Submit one yellow CE form.

 Insurance CE |  Attorney CLE | Note: CE for other professions can be administered based on submission of yellow forms.



# Advanced Trustees and Administrators Institute

**MONDAY, JUNE 24, 2019**

9:00-10:15 a.m.

**Concurrent Sessions**

## Legislative Update—Retirement Funds

With the midterm elections behind us, there are a lot of questions about what lies ahead from our new Congress. Join us for this session to look at what the legislative agenda might be for retirement plans in 2019, including:

- Legislation and political proposals
- Effects of future pensions
- Future of the PBGC
- MPRA—Summary of the applications
- *Janus v. AFSCME*.

**Neal S. Schelberg**, *Partner, Proskauer LLP, New York, New York*

## Understanding Your Insurance Options

Even the most advanced trustee can get confused by insurance terminology. This session covers advanced insurance concepts that will provide you with a strong foundation for other issues addressed at this conference. Topics include:

- What's covered under your insurance
- Insured vs. self-funded benefits
- Stop-loss
- Fiduciary
- Cybersecurity
- General liability.

**Daniel Aronowitz**, *Managing Director, Euclid Specialty Managers, Vienna, Virginia*

10:30-11:45 a.m.

**Concurrent Sessions**

## Legislative Update—Health Funds

The last couple of years have been filled with uncertainty regarding the health care environment. Now that a new Congress has been elected, what does the next year hold for the Affordable Care Act and health care across the country? This session will discuss the possibilities, including:

- Status of ACA
- State laws that respond to this trend
- What do the next two years look like?
- State legislators—PBMs protecting their power
- *Janus v. AFSCME*.

**Allison A. Madan**, *Principal, Slevin & Hart, P.C., Washington, D.C.*

## Properly Communicating Retirement Options

We strive to provide our plan participants with the tools they need so that they can retire comfortably. But what information do you have to help them in this process? This session will cover the retirement needs for different generations, retirement vehicles available for utilization, as well as how to best communicate this information to your participants. Topics include:

- How defined benefit pension plans compare to 401(k)s
- Increased exposure to investment volatility
- How personal savings and Social Security affect future retirement
- Hybrid plans—Alternative plans
- Phased retirement.

**William A. Cumming, Esq.**, *Shareholder, Hessian & McKasy, P.A., Minneapolis, Minnesota*

**Tupper Hillard**, *Senior Consultant, SLiM Communications, Phoenix, Arizona*

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 Insurance CE |  Attorney CLE | *Note: CE for other professions can be administered based on submission of yellow forms.*

# Advanced Trustees and Administrators Institute

**MONDAY, JUNE 24, 2019**

11:45 a.m.-1:15 p.m.

Lunch/Exhibit Hall Open

1:15-2:30 p.m.

**Concurrent Sessions**

## The Changing Health Care Environment **1** **2**

Managing health care plans is complicated, and one way to make it easier is by keeping up to date on current health care trends and strategies. This session will feature a spectrum of topics including:

- Health care inflation—Is it coming back?
- Effects of federal legislation on ACA
- Plan mergers—Benefits of increased participation
- Multistate and multiregion issues
- Provider mergers
- Types of eligibility standards and practices.

**William F. Feyling**, Executive Director, Carpenters 46 Northern California Counties Conference Board, Oakland, California

**Stephanie Patrick, FSA, MAAA**, Consulting Actuary, Horizon Actuarial Services, LLC, Atlanta, Georgia

## Tackling Prohibited Employment **2**

What happens when retirement doesn't stick? This session will discuss the challenges of prohibited employment for those who elected to retire but continue to work in the industry. This session will cover:

- The problem of taking a pension and still working
- Typical fund policies
- Who makes a decision on what to do
- Suspension of benefits
- Fiduciary responsibility.

**Todd G. Helfrich**, President and Chief Executive Officer, Eastern Contractors Association, Inc., Albany, New York

**Katherine A. Hesse, CEBS, CEBS-Compliant**, Partner, Murphy, Hesse, Toomey & Lehane LLP, Boston, Massachusetts

**Joseph F. Ohm**, Fund Administrator, Plumbers' and Technical Engineers' Local 130 Benefit Funds, Chicago, Illinois

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**1** Insurance CE   **2** Attorney CLE | Note: CE for other professions can be administered based on submission of yellow forms.

# Advanced Trustees and Administrators Institute

**MONDAY, JUNE 24, 2019**

2:45-4:00 p.m.

## What to Do About Cybersecurity **1** **1**

With the amount of personal data kept on file, benefit plans are as susceptible to data breaches as any major corporation. This session will help you understand the things you need to do to prevent a breach from occurring. A range of topics will be addressed, including:

- Identity issues
- What are your vulnerabilities?
- Stress-testing your system through an independent verification
- Auditing your system
- Cyberliability insurance—Challenges of selection and renewals
- Cost of cybersecurity
- Training your employees.

**Frank E. Tanz**, *Vice President and Senior Consultant, Administration & Technology Consulting, Segal Consulting, New York, New York*

4:00-5:00 p.m.

## Networking Reception/Exhibit Hall Open

*(Refreshments and light hors d'oeuvres will be served.)*

**TUESDAY, JUNE 25, 2019**

6:30 a.m.-4:30 p.m.

## Registration/Information

6:30-7:30 a.m.

## Continental Breakfast/Exhibit Hall Open

7:30-8:45 a.m.

## Pharmacy Benefits **1** **1**

### Concurrent Sessions

This session will help explain the complexity of pharmacy benefits and discuss the most recent trends and cost measures affecting the industry today. Topics include:

- Specialty drugs
- Trends in biologics, new technology, injectables
- Design alternatives—Designing drugs to your DNA
- Stop-loss insurance
- Audits of your plan
- Pros and cons of PBM mergers.

**Kristin Begley, Pharm.D.**, *Principal, All Tru Health, Lewes, Delaware*

**Kenneth B. Berry**, *President, KB Berry & Assoc., Inc., Walnut Creek, California*

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**1** Insurance CE | **1** Attorney CLE | *Note: CE for other professions can be administered based on submission of yellow forms.*

# Advanced Trustees and Administrators Institute

TUESDAY, JUNE 25, 2019

7:30-8:45 a.m.

Concurrent Sessions (Cont.)

## Payroll Audits and Delinquencies ①

Efficient payroll audits require many players, a good process and solid policies. This session will focus on:

- Collections—Options on how to pursue different delinquencies
- Online cybersecurity
- Fiduciary responsibilities
- Joint fund policies
- Access to records, failure to comply issues
- Distribution of collections.

**Kurt D. Needles, CPA, Owner, Needles & Associates LLC, Broomfield, Colorado**

**Charles R. Virginia, Esq., Co-Founder, Virginia & Ambinder, LLP, New York, New York**

9:00-10:15 a.m.

Concurrent Sessions

## Handling the Opioid Epidemic ① ①

Despite our best efforts, opioid use continues to rise at an alarming rate. It impacts our communities, workplaces and families, but there are things our plans can do to help. This session will discuss:

- Dispelling myths
- Drug testing
- Treatment types—Member assistance programs, employee assistance programs
- Medical assistance therapies, alternative therapies
- Preventive measures to implement that can help employees avoid addiction
- Inheriting addicts from other plans.

**Paul Mulhausen, M.D., M.H.S., Chief Medical Officer, Telligen, West Des Moines, Iowa**

## The Challenges of Withdrawal Liability ① ①

Collecting the funds that are owed to your plan is a complicated task, and in this economic environment you cannot afford to ignore your collections program. This session will examine the challenges your plan faces with collections and withdrawal liability, including:

- Full vs. partial withdrawals
- Withdrawal liability calculations and payments
- Impact on bargaining, organizing and business transactions
- Multiemployer exemptions—Construction and entertainment
- Successor employer exemptions.

**Jay K. Egelberg, ASA, EA, FCA, MAAA, Consulting Actuary, First Actuarial Consulting, Inc. (FACT), New York, New York**

**James K. Estabrook, Esq., Shareholder, Lindabury, McCormick, Estabrook & Cooper, P.C., Westfield, New Jersey**

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① Insurance CE | ① Attorney CLE | Note: CE for other professions can be administered based on submission of yellow forms.

# Advanced Trustees and Administrators Institute

TUESDAY, JUNE 25, 2019

10:30-11:45 a.m.

Concurrent Sessions

## Mental Health ① ②

Mental health benefits cover everything from opioid abuse to depression to alcohol abuse and more. The costs, coverage and availability of these benefits vary from plan to plan, but understanding how these benefits work can help plans focus on what is needed for the future. This session discusses:

- Mental health parity
- Innovative approaches
- Employee assistance programs—  
How do they work?
- Health funds and opioids
- Utilization review
- Special issues: PTSD and concussions.

**Brendan J. Young, CEAP, LCSW, SAP, President and CEO, Mental Health Consultants Inc., North Wales, Pennsylvania**

## Running Effective Trust Fund Meetings

This session will focus on best practices in running an effective trust fund meeting, including:

- Process and policies
- Reporting of internal information
- Rules of order
- Preparation
- The role of professionals
- Dealing with conflict.

**Paula D. Allphin, Client Services Executive, Zenith American Solutions, Mokena, Illinois**

**Jeff Anderson, Secretary-Treasurer, United Food and Commercial Workers (UFCW) Local 555, Portland, Oregon**

**Anthony S. Cacace, Senior Counsel, Proskauer LLP, New York, New York**

11:45 a.m.-1:15 p.m.

## Lunch/Exhibit Hall Open

1:15-2:30 p.m.

Concurrent Sessions

## Ancillary Benefits Options ① ②

An area of benefits that is oftentimes ignored, ancillary benefits provide essential coverage that helps participants meet their basic health care needs. This session will dive into the complexities of ancillary benefits and cover a variety of topics, including:

- Dental, vision, hearing and other typical add-on benefits
- What does it take to administer ancillary benefits?
- Pay as you go
- Tax-favored basis—Section 125
- Cheaper alternatives on the market.

**Keith Earl, Actuarial Analyst, Horizon Actuarial Services, LLC, Atlanta, Georgia**

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# Advanced Trustees and Administrators Institute

**TUESDAY, JUNE 25, 2019**

1:15-2:30 p.m.

**Concurrent Sessions (Cont.)**

## Advice on How to Handle Your DOL/IRS Audits **i** **@**

Are you prepared for when IRS or DOL comes knocking at your door? This session will cover the important things you need to know should you undergo an audit.

- Understanding the audit process
- Health and welfare audits
- What they look for, preparing your plan
- Trustees' expenses

**Marcelle J. Henry, Esq.**, Partner and Chair of the Employee Benefits Practice Group, Pitta LLP, New York, New York

**James W. Versocki, Esq.**, Partner, Archer, Byington, Glennon & Levine LLP, Melville, New York

## Effective Trust Fund Administration

This session will review best practices in trust fund administration. Topics include:

- Establishing meaningful metrics of performance
- Leadership development
- Technology tools
- Participant communication.

**Kristina M. Guastaferrri, CPA**, Administrator, Chicago Regional Council of Carpenters Benefit Funds, Chicago, Illinois

**Larry P. McNutt, CPA**, Senior Vice President, Corporate and Pension Administration, Northwest Administrators, Inc., Seattle, Washington

**Rachel Mora**, Plan Manager, BeneSys, Inc., Las Vegas, Nevada

2:45-4:00 p.m.

**Concurrent Sessions**

## Guided Open Forum—Trustees

This session will be devoted to addressing challenges and opportunities with a panel of trustees and plan professionals who will discuss topics submitted by the audience throughout the conference. It is an opportunity to get your questions answered, discuss problems and take away workable ideas.

**Jeff Anderson**, Secretary-Treasurer, United Food and Commercial Workers (UFCW) Local 555, Portland, Oregon

**William F. Feyling**, Executive Director, Carpenters 46 Northern California Counties Conference Board, Oakland, California

**William C. Ligetti**, Management Trustee, Plasterers and Cement Masons Pension Fund, Harrisburg, Pennsylvania

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# Advanced Trustees and Administrators Institute

**TUESDAY, JUNE 25, 2019**

2:45-4:00 p.m.

**Concurrent Sessions (Cont.)**

## Guided Open Forum—Administrators

This session will be devoted to addressing challenges and opportunities with a panel of administrators and plan professionals who will discuss topics submitted by the audience throughout the conference. It is an opportunity to get your questions answered, discuss problems and take away workable ideas.

**Paula D. Allphin**, Client Services Executive, Zenith American Solutions, Mokena, Illinois

**Kristina M. Guastaferrri, CPA**, Administrator, Chicago Regional Council of Carpenters Benefit Funds, Chicago, Illinois

**Ronald W. Laudel**, Benefit Plans Administrator, St. Louis-Kansas City Carpenters Regional Benefit Services, St. Louis, Missouri

## Changes in Retiree Health **i** **@**

There is a continued need for our health care systems to adapt as more and more Baby Boomers reach retirement age. What can our plans do to help ensure quality delivery of retiree health care services? This session will cover that, and more, by discussing:

- Trends and strategies commonly implemented by health funds
- Moving retirees off the active employee health plan
- Savings to members through separate funding.

“

You should go to Trustees and Administrators Institutes!  
Lots of education that is solid on both traditional topics  
as well as late-breaking.

**William (Bill) Howard**  
Director  
CSEA Employee Benefit Fund

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# Advanced Trustees and Administrators Institute

WEDNESDAY, JUNE 26, 2019

6:30-11:45 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m.

## What to Expect From Your Investment Consultants and Managers

Are you making the best decisions for your benefit plan, and are your investment consultants and managers helping you in this process? This session will discuss investment procedures to adopt to ensure that your investment plan professionals can help you reach your returns. Topics include:

- Typical investment policies
- How and when to challenge their performance
- How often to undergo an RFP process
- Active vs. passive managers—  
And their fees
- Asset liability matching
- Proxy policy.

**Ian Toner, CFA**, Chief Investment Officer, Verus Investments, Seattle, Washington

**William C. Ligetti**, Management Trustee, Plasterers and Cement Masons Pension Fund, Harrisburg, Pennsylvania

**Richard Masur**, Labor Trustee, SAG Pension Plan & SAG-AFTRA Health Plan, Burbank, California

9:00-10:15 a.m.

## The Trustee-Administrator Relationship

One of the most important factors in running an efficient benefit plan is having a strong trustee-administrator relationship. This session will cover the typical challenges trustees and administrators face, how to meet your objectives together and how different administrator types can affect the management of your plan.

- What to expect
- How to cultivate this relationship—  
Team building
- How co-chairs lead
- The differences between TPAs and salaried administrators
- The role of committees

**Ronald W. Laudel**, Benefit Plans Administrator, St. Louis-Kansas City Carpenters Regional Benefit Services, St. Louis, Missouri

**Ryk Tierney, CEBS**, Executive Director, IAM National Benefit Funds, Washington, D.C.

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# Advanced Trustees and Administrators Institute

**WEDNESDAY, JUNE 26, 2019**

10:30-11:45 a.m.

## Auditing the Auditor

All plans undergo internal audits, but do you know whether your auditor is properly doing the job? This session will help you meet your fiduciary responsibilities by giving you the tools you need to evaluate your auditor so your plan's audits are as efficient as possible. Topics include:

- How to choose an auditor
- Avoiding conflicts of interest
- Federal regulations
- Timeliness of reporting
- Scheduled rotation—Getting a fresh look at your plan.

*Glenn M. Eyrich, CPA, Partner, Calibre CPA Group, PLLC, Bethesda, Maryland*

## Hotel Information

June 24-26, 2019 | San Francisco, California

### Hilton San Francisco Union Square

Hilton San Francisco Union Square is located in the theater district of San Francisco and is within walking distance of both cable cars and Chinatown. This historic hotel provides beautiful city views as well as relaxation on its 16th-floor pool deck.



The International Foundation has secured a reduced room rate of \$299 single/double for attendees. You must book your room through the International Foundation by specifying your hotel needs on your registration form. Reservation deadline is May 21, 2019.

### Location Details

San Francisco and its winding streets have much to offer. Located on a peninsula in Northern California, the city is surrounded by the San Francisco Bay and the Pacific Ocean. San Francisco is widely known for the Golden Gate Bridge, cable cars and colorful Victorian homes. Fisherman's Wharf is a popular attraction that offers crab shacks for snacking, San Francisco souvenirs and the famous sea lions on the rocks. The Golden Gate Bridge, spanning one mile across the strait connecting the bay and the Pacific Ocean, is the second-longest bridge in the United States.



# Accounting and Auditing Institute for Employee Benefit Plans

*Held in conjunction with the Trustees and Administrators  
Institutes and the Public Employee Benefits Institute*

[www.ifebp.org/accountants](http://www.ifebp.org/accountants)

As accountants and auditors who work with benefit plans, you know the importance of staying up to date on the latest accounting rules, reporting and disclosure requirements, and the changing benefits industry. On top of all that, the DOL focus on audit quality demands a commitment to education. Take advantage of this opportunity to stay educated and earn continuing professional education (CPE) credit while networking with peers as well as trustees and administrators who are attending the accompanying programs.

## Who Should Attend

The Accounting and Auditing Institute for Employee Benefit Plans is designed for internal and external accountants who serve employee benefit plans. Sessions will appeal to both new and seasoned practitioners who serve single employer and multiemployer plans.

## Special Registration Discounts

**Pair Up With a Colleague**—Bring individuals from your firm or fund who have NOT previously attended the Institute, and they will receive a \$400 discount with your paid registration (at the regular rate). New attendees should enter code 19NEWG1 when registering.

## Schedule

Sunday, June 23, 2019 8:00 a.m.-1:00 p.m.

*Preconference: Diversity Training—Foundations for an Effective Diverse Team*

Monday, June 24, 2019 7:30 a.m.-4:00 p.m.

Tuesday, June 25, 2019 7:30 a.m.-4:00 p.m.

Wednesday, June 26, 2019 7:30-11:45 a.m.

## Sessions Include

- Accounting and Auditing Update
- DOL Update
- Advice on How to Handle Your DOL/IRS Audits
- Claims Auditing
- An All-Inclusive on Multiemployer Plans
- Auditor's Consideration of Internal Controls
- Technology in Accounting and Auditing
- Inside the Board Meeting
- Payroll Auditing and Accounting for Contributions
- Risk Assessment—Back to Basics
- Hard-to-Value Assets
- Emerging Issues and Best Practices
- Guided Open Forum—Accountants
- What to Do About Cybersecurity
- The Challenges of Withdrawal Liability
- Economic Update



# 65<sup>th</sup> ANNUAL EMPLOYEE BENEFITS CONFERENCE

October 20-23, 2019 | San Diego, California  
San Diego Convention Center  
Preconference: October 19-20, 2019  
[www.ifebp.org/usannual](http://www.ifebp.org/usannual)

#IFEAnnual | @IFEAnnual

The largest educational event of its kind, the Annual Conference brings together thousands of trustees and administrators and their professional advisors. More than 100 sessions are offered—and not one is sponsored, ensuring the content you receive is free from sales pitches. Sessions are led by more than 200 trustees, administrators and experts from the field. You'll hear from others who have walked in your shoes and who understand the challenges you face. Takeaway points are provided with every session, and the exhibit hall has more than 200 service providers ready to help you with your fund management.



# Exhibit and Sponsorship Opportunities

Do you have a service provider that could benefit from exhibiting at or sponsoring the Trustees and Administrators Institutes? Or do you offer a product or service that could be beneficial to trustees and administrators supporting multiemployer and public sector benefit plans? Valuable exhibitor and sponsorship opportunities are available at the February and June institutes.

## Contact Us!

### For Exhibits

Sandra Lange | (262) 373-7657 | sandral@ifebp.org

### For Sponsorships

Diane Mahler | (262) 373-7656 | dianem@ifebp.org

**75%** of attendees at the Trustees and Administrators Institutes **do not** attend the Annual Conference—exposing you to a new audience.

## Benefits of Exhibiting at the Trustees and Administrators Institutes

The exhibit hall at the Trustees and Administrators Institutes is structured specifically to build valuable connections with attendees. As an exhibitor, you will:

- Reach a concentrated audience of nearly 400 trustees, administrators and plan professionals who serve multiemployer benefit plans
- Build relationships among those who do not attend the Annual Conference (75% of attendees at the institutes do not attend the Annual Conference.)
- Secure quality leads—Attendees at the institutes are decision makers who can directly impact your bottom line
- Learn about the issues impacting your clients today by participating in educational sessions and networking with peers.



## Each Exhibit Space Includes:

- One complimentary conference registration
- Company listing in preconference and conference publications
- Exhibitor listing on website
- Promotional listing in the *Exhibitor and Sponsor Directory*, which is distributed to all attendees.



Reception, continental breakfast and luncheons are served in the exhibit hall. Limited spaces available!

**Ready to Learn More?** Request a **2019 Exhibitor Prospectus** for full details.

Contact Sandra Lange | (262) 373-7657 | sandral@ifebp.org

# Exhibit and Sponsorship Opportunities

## Benefits of *Sponsoring the Trustees and Administrators Institutes*

Sponsorship opportunities are designed to give you maximum value for your dollar before, during and even after the conference. As a sponsor, you will:

- Expand your brand recognition among a coveted group of individuals who can impact your business
- Receive exposure on our website, in on-site signage and program materials, with sponsor ribbons and more!
- Gain a competitive advantage by meeting with attendees face-to-face, answering their questions and hearing about the issues of greatest concern to them.

## Platinum Sponsorships—\$15,000

### *Exclusive Small-Conference Lanyards for a Year*

- Opportunity for one organization to sponsor attendee lanyards used at ALL smaller conferences within the year (does not include HBCE, Annual Conference or Symposium). Request a sponsor brochure for more details.
- Sponsor representative(s) must register and pay appropriate fee to attend conferences.



## Gold Sponsorships—\$5,000

### *Sponsorship of Attendee Luncheon*

- Includes one complimentary conference registration **plus** one conference registration at a 50% discount

### *Exclusive Sponsorship of Conference App*

- Your company logo appears on splash screen each time attendees open the app.
- Includes one complimentary conference registration **plus** one conference registration at a 50% discount



### *Small-Conference Bundle Discount*

- Sponsor any three or more smaller conferences at the Gold Level within a calendar year and receive a 20% discount on each sponsorship.
- Includes one complimentary conference registration at each sponsored conference



## Silver Sponsorships

### *Sponsorship of Continental Breakfast*

- Includes one complimentary conference registration

## Bronze Sponsorships

### *Sponsorship of Refreshment Break*

- Includes one conference registration at a 50% discount



**Ready to Learn More?** Request a **2019 U.S. Sponsor Opportunities** brochure for full details. Contact Diane Mahler | (262) 373-7656 | dianem@ifebp.org

NEW FOR 2019!

NEW FOR 2019!

## REGISTRATION INCLUDES

Continental breakfasts • Lunches  
Welcome reception • Networking reception

## 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 60 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.



Educational sessions at this program can qualify for CEBS Compliance credit. Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.

## POLICIES

**New cancellation policies effective for 2019 education programs.** Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before 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 program commences. For details and the 2019 policy, see [www.ifebp.org/policies](http://www.ifebp.org/policies).

## JOIN US ONLINE



#IFE BP

# REGISTRATION/2019

## Trustees and Administrators Institutes

### Attendee Information (Please print clearly)


Source code **1909 W**

Individual ID# or CEBS® ID# \_\_\_\_\_  
 Full first name \_\_\_\_\_ M.I. \_\_\_\_\_ Last name \_\_\_\_\_  
 Employer \_\_\_\_\_  
 Title \_\_\_\_\_  
 Address \_\_\_\_\_  Business  Home  
 City \_\_\_\_\_ State/Province \_\_\_\_\_ Country \_\_\_\_\_ ZIP/Postal code \_\_\_\_\_  
 Phone \_\_\_\_\_  Business  Home  Mobile  
 Email \_\_\_\_\_  
 Form completed by \_\_\_\_\_ Phone \_\_\_\_\_

**Not a Member? Join Now and Save!** Visit [www.ifebp.org/join](http://www.ifebp.org/join) for current rates.

Individual \$325  Organizational \$1,050

### Registration Information

Bill to organization name \_\_\_\_\_  
 Bill to organization ID # \_\_\_\_\_  
 Badge name \_\_\_\_\_ Badge title \_\_\_\_\_  
 Special assistance—specify \_\_\_\_\_  
 Special dietary requirements—specify \_\_\_\_\_

### New Trustees Institute—Level I: Core Concepts

June 24-26, 2019 • San Francisco, California (Late fee after May 13, 2019) (#09-1909NT)

	Early fee		Late fee	
	Member	Nonmember	Member	Nonmember
Registration fee .....	<input type="checkbox"/> \$1,515	<input type="checkbox"/> \$1,845	<input type="checkbox"/> \$1,815	<input type="checkbox"/> \$2,145
Sunday preconference fee .....	<input type="checkbox"/> \$ 455	<input type="checkbox"/> \$ 565	<input type="checkbox"/> \$ 605	<input type="checkbox"/> \$ 715

### Advanced Trustees and Administrators Institute

June 24-26, 2019 • San Francisco, California (Late fee after May 13, 2019) (#09-1909)

	Early fee		Late fee	
	Member	Nonmember	Member	Nonmember
Registration fee .....	<input type="checkbox"/> \$1,515	<input type="checkbox"/> \$1,845	<input type="checkbox"/> \$1,815	<input type="checkbox"/> \$2,145
Sunday preconference fee .....	<input type="checkbox"/> \$ 455	<input type="checkbox"/> \$ 565	<input type="checkbox"/> \$ 605	<input type="checkbox"/> \$ 715

### Hotel

**Hilton San Francisco Union Square \$299 single/double**  
**Reservation deadline is May 21, 2019. (Include \$400 hotel deposit.)**

# of Adults \_\_\_\_\_ # of Children \_\_\_\_\_ Arrival date \_\_\_\_\_ Departure date \_\_\_\_\_  
 King bed  Two beds Special requests—describe \_\_\_\_\_

### Continuing Education Credit

The International Foundation will apply for CE credit based on requests indicated below.

Actuary  Attorney  CFP  CIMA  CPA  HRCI  
 Insurance producer\*  SHRM  Other, specify \_\_\_\_\_

**CEBS Compliance**—Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.

Licensed in the state(s) of \_\_\_\_\_

License/NPN/BAR/CPA # \_\_\_\_\_

\*Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Late requests could preclude insurance producers from earning credit. **NOTE: Requests made for CE credit on this form do not guarantee administration of credit.**

### Payment Must Accompany Order

**NEW! Policies have changed. See [www.ifebp.org/policies](http://www.ifebp.org/policies).**

Make check payable to International Foundation.

Check # \_\_\_\_\_ \$ \_\_\_\_\_

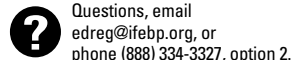
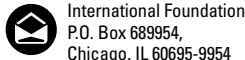
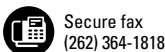
Credit card # \_\_\_\_\_

Exp. date \_\_\_\_\_

Cardholder's name (print) \_\_\_\_\_

### Registration/Order Summary

Membership fee \$ \_\_\_\_\_  
 Conference fee \$ \_\_\_\_\_  
 Preconference fee \$ \_\_\_\_\_  
 Hotel deposit (\$400) \$ \_\_\_\_\_  
**Total (U.S. funds) \$ \_\_\_\_\_**



## New Trustees Institute—Level I Sessions:

- Trustee Responsibility and Legal Environment
- Overview of Health and Welfare Plans
- Overview of Retirement Plans
- Investing Health and Welfare and Pension Assets
- Governance

## Advanced Trustees and Administrators Sessions:

- Economic Update
- Properly Communicating Retirement Options
- The Changing Health Care Environment
- Tackling Prohibited Employment
- What to Do About Cybersecurity
- Pharmacy Benefits
- Handling the Opioid Epidemic
- Running Effective Trust Fund Meetings
- Changes in Retiree Health
- What to Expect From Your Investment Consultants and Managers
- The Trustee-Administrator Relationship

**Register by May 13, 2019 to save \$300!**

Visit [www.ifebp.org/trusteesadministrators](http://www.ifebp.org/trusteesadministrators) for more information.

ED195231



18700 West Bluemound Road  
Brookfield, WI 53045  
[www.ifebp.org](http://www.ifebp.org)

**Source Code: 1909 W**

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OF EMPLOYEE BENEFIT PLANS