

# Trustees & Administrators Institute

June 29-July 1, 2020

Hilton San Francisco Union Square  
San Francisco, California

Trustees and  
Administrators Institute

New Trustees Institute—  
Level I: Core Concepts

New Trustees Institute—  
Level II: Concepts in Practice  
June 27-28, 2020

PRECONFERENCE  
**Traps, Tricks and Deception—  
Protecting Your Fund From High-Cost Cyber Risks**

June 28, 2020

# Trustees & Administrators Institute

Hundreds of 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. 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

### **Two-Day Preconference: New Trustees Institute— Level II: Concepts in Practice**

Designed for multiemployer trustees with three to five years of experience who have taken New Trustees Institute—Level I: Core Concepts

### **One-Day Preconference: Traps, Tricks and Deception— Protecting Your Fund From High-Cost Cyber Risks**

Designed for trustees, administrators and plan professionals

### **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

### **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 to case studies. The value of your attendance will continue long after you've left the program.

# PROGRAM AT A GLANCE

## PRECONFERENCES

**Saturday, June 27**—8:00 a.m.-5:00 p.m.  
**AND**  
**Sunday, June 28**—8:00 a.m.-4:00 p.m.

New Trustees Institute—  
Level II: Concepts in Practice

**Sunday, June 28**—8:00 a.m.-1:00 p.m.

Traps, Tricks and Deception—Protecting Your Fund From High-Cost Cyber Risks

## NEW TRUSTEES INSTITUTE—LEVEL I: CORE CONCEPTS

### MONDAY | June 29

**7:30-11:30 a.m.**

Trustee Responsibility and Legal Environment

**12:30-4:30 p.m.**

Overview of Health and Welfare Plans

### TUESDAY | June 30

**7:30-11:30 a.m.**

Overview of Retirement Plans

**12:30-4:30 p.m.**

Investing Health and Welfare and Pension Assets

### WEDNESDAY | July 1

**7:30-11:30 a.m.**

Governance

## TRUSTEES AND ADMINISTRATORS INSTITUTE

### MONDAY | June 29

**7:30-8:45 a.m.**

Economic Update

**9:00-10:15 a.m.**

Political and Legislative Changes in Health Care

Reading and Understanding the Actuarial Report

**10:30-11:45 a.m.**

Pension Reform and Retirement Benefits Update

Wellness Programs—Are They Working for Your Fund?

**1:15-2:30 p.m.**

Retirement Insecurity—  
Diagnosis of the Retirement Landscape

End-of-Life Planning

**2:45-4:00 p.m.**

Funding Challenges

Medicare for All and the Public Option

### TUESDAY | June 30

**7:30-8:45 a.m.**

Opioid Epidemic

Innovations in Digital Health Care for Families

**9:00-10:15 a.m.**

Impact of Divorces on Your Benefit Plans

On-Site Clinics

**10:30-11:45 a.m.**

Trustee-Administrator Relationship

Communicating About DC Plans in a DB World

**1:15-2:30 p.m.**

Successorship and Building an Effective Board of Trustees

Pharmacy Benefits

**2:45-4:00 p.m.**

Guided Open Forum—Trustees

Guided Open Forum—Administrators

Consolidations in the Health Care Industry

### WEDNESDAY | July 1

**7:30-8:45 a.m.**

Marijuana Law Update

**9:00-10:15 a.m.**

Resiliency and Mental Health

**10:30-11:45 a.m.**

Running Effective Trust Fund Meetings

# Traps, Tricks and Deception— Protecting Your Fund From High-Cost Cyber Risks

Sunday, June 28, 2020 | 8:00 a.m.-1:00 p.m

Fraud can happen at any time, in any place, which means it's more important than ever to do your due diligence and have the knowledge you need to protect your organization's well-being. Regardless of the security measures they have in place, all organizations are vulnerable to the threat of fraud. You are responsible for having the tools necessary to prevent issues such as cyberattacks, data breaches and claims fraud.

## Learning Objectives

- How to spot social engineering fraud
- Monitoring tools and tests to be implemented to help avoid cybersecurity fraud
- Providers that offer solutions
- Creating an appropriate insurance portfolio
- What coverage typically contains
- Third-party coverage

## Who Should Attend?

This workshop is designed for all those responsible for the preservation and protection of plan assets. With the rapid change in technology and the ever-changing threat of cyberattacks, every benefits practitioner could benefit from this critically important education.



**Sarah Sargent,**  
**CIPP/US, CIPP/E**  
Attorney  
Godfrey & Kahn, S.C.  
Milwaukee, Wisconsin



**Justin P. Webb, CIPP/US**  
Attorney and Chief  
Information Security  
Officer  
Godfrey & Kahn, S.C.  
Milwaukee, Wisconsin

***Separate registration fee is required.***

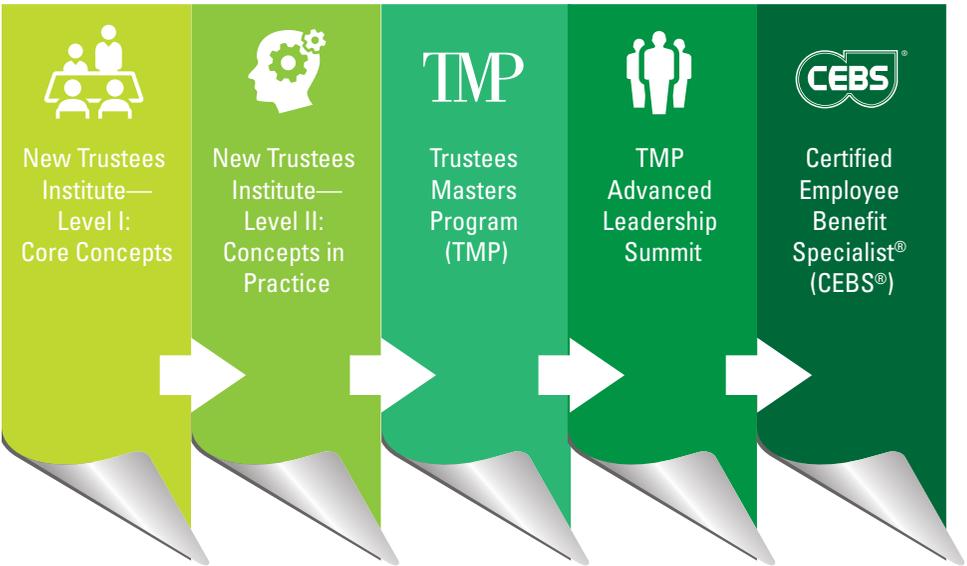
\$465 members/\$575 nonmembers until May 18.

# 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/trusteepath](http://www.ifebp.org/trusteepath).**

# New Trustees Institute— Level II: Concepts in Practice

Saturday, June 27, 2020 | 8:00 a.m.-5:00 p.m.

Sunday, June 28, 2020 | 8:00 a.m.-4:00 p.m.

***Register early—Classes sell out quickly!***

This program was designed for those who completed the New Trustees Institute—Level I: Core Concepts. Picking up where Level I leaves off, Level II: Concepts in Practice takes a deeper dive into key topics and explores how they apply to trust fund management.

Developed and presented by experienced multiemployer fund trustees, administrators and advisors, this institute provides the practical information a trustee needs to know with a focus on application. Limited attendance and small-group discussion of real-world examples will give you a firmer grasp of your fiduciary responsibilities and effective trust fund management.

**“New Trustees—Level II tied a lot of things together. The information from the activities was especially helpful. This is a necessary training program if you plan to be a trustee.”**

**Ira Douglas**

Director, Labor Relations  
Crowley MEBA Benefit Plans  
Jacksonville, Florida

***Separate registration fee is required.***

\$1,550 members/\$1,880 nonmembers until May 18.

## SATURDAY | June 27

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7:00-8:00 a.m.

### **Continental Breakfast**

8:00 a.m.-12:15 p.m.

### **Governance/Administration**

- Fiduciary duty
- Policies and procedures
- Group scenarios
- Prohibited transactions
- Deadlocks and arbitration
- Board governance
- Fraud prevention detection

12:15-1:00 p.m.

### **Lunch (provided)**

1:00-5:00 p.m.

### **Investments**

- Terminology and reports
- Who are the players? What are their roles?
- Asset allocation
- Other investment issues
- Alternative investment options
- Investment open forum

## SUNDAY | June 28

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7:00-8:00 a.m.

### **Continental Breakfast**

8:00-11:30 a.m.

### **Retirement**

- Financial literacy
- DC plans/annuity
- Pension basics
- PPA-MPRA
- Plan redesign
- Withdrawal liability
- Open forum

11:30 a.m.-12:15 p.m.

### **Lunch (provided)**

12:15-4:00 p.m.

### **Health Plans**

- Health plan basics
- Appeals committee
- Prescriptions and mental health
- Monitoring and selecting service providers
- Rapid-fire Q&A
- Emerging issues

# New Trustees Institute— Level I: Core Concepts

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 28

4:00-6:00 p.m.

### **Registration/Exhibit Hall Open/Welcome Reception**

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

## MONDAY | June 29

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

### **Registration Open/Exhibit Hall Open**

6:30-7:30 a.m.

### **Continental Breakfast**

7:30-11:30 a.m.

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

- 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**

12:30-4:30 p.m.

## **Overview of Health and Welfare Plans**

- 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

4:30-5:00 p.m.

## **Networking Reception/Exhibit Hall Open**

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

## **TUESDAY | June 30**

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

## **Registration/Information**

6:30 a.m.-1:30 p.m.

## **Exhibit Hall Open**

6:30-7:30 a.m.

## **Continental Breakfast**

## TUESDAY | June 30 *(continued)*

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7:30-11:30 a.m.

### Overview of Retirement Plans

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

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

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

### Lunch

12:30-5:00 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

**NOTE:** The New Trustees Institute—Level I is also offered on November 14-16, 2020 as a preconference to the U.S. Annual Employee Benefits Conference at the Hawaii Convention Center in Honolulu, Hawaii.

## WEDNESDAY | July 1

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6:30-11:30 a.m.

### Registration/Information

6:30-7:30 a.m.

### Continental Breakfast

7:30-11:30 a.m.

### Governance

- 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

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

**Christopher E. Brecht, GBA, RPA**, Senior Vice President Mid-Atlantic, BeneSys Inc., Columbia, Maryland

**Aaron Slaughter, CPA**, Audit Manager, WithumSmith+Brown, PC, Bethesda, Maryland



# Trustees and Administrators Institute

The 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 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 28

4:00-6:00 p.m.

### **Registration/Exhibit Hall Open/Welcome Reception**

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

## MONDAY | June 29

6:30 a.m.-5:00 p.m.

### **Registration Open/Exhibit Hall Open**

6:30-7:30 a.m.

### **Continental Breakfast**

7:30-8:45 a.m.

### **Economic Update**

Favorable investment returns are key to providing stability to your benefit funds, but there is often some insecurity in economic conditions during a presidential election. With the economy dominating the national conversation this year, this opening session will offer a snapshot of the current economic forecast that considers:

- Current market conditions
- Key economic indicators
- How presidential elections affect investments.

**Libby Cantrill, CFA**, Executive Office, Public Policy, Pacific Investment Management Company (PIMCO), New York, New York

**Concurrent Sessions** | 9:00-10:15 a.m.

## Political and Legislative Changes in Health Care

Health care dominated the news during the 2018 midterm elections and continues to be a controversial political topic. This session will discuss health care changes made over the last year at both the state and national levels, the potential future for the Affordable Care Act (ACA) and other topics such as:

- Trends in inflation
- Effects of federal legislative changes on ACA
  - Repeal of certain ACA requirements
  - Court cases on ACA
- Evolution of health care in states that fully enacted ACA vs. those that didn't
- Current state of ACA exchanges
- HRA and HSA regulations.

**Lisa M. Gomez**, Partner, Cohen, Weiss and Simon LLP, New York, New York

## Reading and Understanding the Actuarial Report

Actuarial reports may seem easy to understand but, in reality, they are a complicated matter. In this session, we will discuss the most important aspects of actuarial reports to ensure that you fully understand the process and terminology, including:

- What is typically included in an actuarial report
- Trends in actuarial science
- Present value of benefits
- Credit balance and standard cost.

**Charles T. Carr**, Consulting Actuary, Southern Actuarial Services Company, Inc., Atlanta, Georgia



## MONDAY | June 29 *(continued)*

**Concurrent Sessions** | 10:30-11:45 a.m.

### **Pension Reform and Retirement Benefits Update**

Presidential politics permeate almost all areas of national discussion during an election year. And although Congress has yet to pass significant pension reform, the looming retirement crisis has caused new proposals and recommendations to be made by politicians of all stripes. Topics for this session include:

- Legislation and political proposals
- The persistent problem of pension underfunding
- PBGC funding problems
- Fiduciary rule.

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

### **Wellness Programs—Are They Working for Your Fund?**

Wellness programs have been touted as a way to engage high-risk plan participants to help improve their health, productivity and morale while saving your plan money in the process. But now that some groups have had these programs in place for a few years, have they been successful in meeting their goals? This session will focus on how wellness programs obtain the best results, as well as discuss:

- Typical wellness operations and programs
- Assessing the value of wellness programs
- Is it money well spent?
  - Are only the healthy people using these programs?
- What it takes to make your program successful.

**Brett R. Powell, B.A., CWPC**, Vice President, Wellness Consultant, American Institute for Preventive Medicine, Farmington Hills, Michigan

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

### **Lunch**



**Concurrent Sessions** | 1:15-2:30 p.m.

## **Retirement Insecurity— Diagnosis of the Retirement Landscape**

What people need for retirement changes as different generations enter the workforce. This session will discuss the various avenues of savings people rely upon for their retirement and how that affects the management of your retirement plans. Topics include:

- Common fear for the future of Social Security
  - How Social Security works within the three-legged stool
  - How to communicate the best retirement options to your participants
- How to measure our current retirement funds
- Taxation of retirement benefits.

**Rick Garnitz**, President, LifeSpan Services, Inc., Atlanta, Georgia

## **End-of-Life Planning**

Life is complicated, and many people are often at a loss about how to handle next steps for their loved ones who are terminally ill. Our plans can help provide tools, guidance and benefits to assist these people in their time of need. In this session, we will discuss end-of-life care and other topics such as:

- Conversation Project and other tools
- Providing information to retirees and other members
- Palliative care and hospice care
- How to communicate options to your participants
- Advanced directives and medical directives.

**Lynne Nowak, M.D.**, Vice President and General Manager Clinical, Data and Provider Solutions, Express Scripts, Saint Louis, Missouri

**Gene H. Price**, Administrator, Carpenter Funds Administrative Office, Oakland, California

**“This program is a great introduction to myriad issues. It gives you a good foundation on which to build your expertise.”**

Glenda S. Finch  
General Counsel  
UMWA Health and Retirement Funds  
Washington, D.C.

## MONDAY | June 29 *(continued)*

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**Concurrent Sessions** | 2:45-4:00 p.m.

### **Funding Challenges**

Many different factors help determine whether your benefit plans are financially solvent. This session will discuss typical funding challenges, including:

- Actuarial assumption rates and demographics
- Aging participant challenges
- Plan maturity challenges
- Industry evolutions and technology advancements
- Mortality tables
- Lawsuits related to smoothing methods.

**Victor P. Harte, EA, MAAA**, Principal and Consulting Actuary, Milliman Inc.,  
Little Falls, New Jersey

**William M. Kinney**, Attorney at Law, Dowd, Bloch, Bennett, Cervone, Auerbach & Yokich,  
Chicago, Illinois

### **Medicare for All and the Public Option**

If you've paid attention to the news over the last few months, you likely have heard various health care proposals related to Medicare for All. But what are the specifics of these plans, and how would they affect our current health care structure? In this session, a panel of health care experts will discuss:

- Proposed health care plans
- What implementation of this legislation may look like
- Pros and cons of these proposals
- Experiences of Canadian health care.

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

**Nick Kingsley**, Consulting Actuary, Horizon Actuarial Services LLC, Atlanta, Georgia

**Noel H. MacKay, CEBS**, Director, National Benefits Consulting, Cowan Insurance Group,  
Brantford, Ontario, Canada

4:00-5:00 p.m.

### **Networking Reception/Exhibit Hall Open**

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

## TUESDAY | June 30

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

### Registration/Information

6:30 a.m.-1:30 p.m.

### Exhibit Hall Open

6:30-7:30 a.m.

### Continental Breakfast

**Concurrent Sessions** | 7:30-8:45 a.m.

### Opioid Epidemic

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

- Stigma about opioid addiction
- Alternative treatments to prescribing opioids
- New programs by the PBMs—  
Are they add-ons or included?
- How to administer an opioid program effectively
- State laws
- Current litigation against pharmaceutical companies.

**Jenny M. Armbruster**, Deputy Executive Director, National Council on Alcoholism and Drug Abuse (NCADA), St. Louis, Missouri

**Lisa L. Kaiser**, CEBS, Fund Administrator, Plumbers & Pipefitters Local 189, Fund Administration Office, Columbus, Ohio

### Innovations in Digital Health Care for Families

One of the biggest advancements in health care over the last few years has been the rise of digital health. In this session, we will discuss what our benefit plans can do to utilize these innovations to best serve our participants and their families. Topics include:

- Innovations in health care delivery
  - Telepsychology and other digital therapies
- Risks and benefits
- Use of digital health care in families
- Implementing these tools in your own health care plan.

**Leah Sparks**, CEO and Founder, Wildflower Health, San Francisco, California

## TUESDAY | June 30 *(continued)*

**Concurrent Sessions** | 9:00-10:15 a.m.

### **Impact of Divorces on Your Benefit Plans**

When a participant gets divorced, it can directly affect his or her future benefits. Your benefit plan needs to have effective policies in place to address these issues, and in this session, we cover:

- Qualified domestic relation orders (QDROs)—Administrative processes
- Medical support orders and the Consolidated Omnibus Budget Reconciliation Act (COBRA)
- Financial disruption
  - Legal plans
  - Beneficiaries and beneficiary forms—Processes and procedures to implement for your fund.

**Carolyn J. Papuga**, Vice President of Operations/Administrator, Wilson-McShane Corporation, Kansas City, Missouri

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

### **On-Site Clinics**

What if you could engage your participants in an effort to improve their health while saving your fund money? On-site clinics have the potential to do this by directly providing health care support to your members for a reasonable cost to the fund. In this session, experts will discuss the fundamentals you need to know about on-site clinics, as well as:

- Managing costs with no copays
- How broad are on-site clinic services?
  - Pharmacy, care
- Different models
  - Clinics operated by the fund
  - Clinics that share services with others.

**John L. Barlament**, Partner, Quarles & Brady LLP, Milwaukee, Wisconsin

**Scott Parks**, President, CareTeam Health, Mount Pleasant, South Carolina

**“Everyone in the industry should and needs to participate in the Trustees and Administrators Institute.”**

Mike Weckman  
Labor Trustee  
Iowa Laborers District Council Health  
Des Moines, Iowa

**Concurrent Sessions** | 10:30-11:45 a.m.

## **Trustee-Administrator Relationship**

One of the most important factors to running an efficient benefit plan is having a strong trustee-administrator relationship. This session will cover the typical challenges trustees and administrators face as well as how to best meet your objectives as a collaborative team. Topics include:

- How to cultivate the trustee-administrator relationship
  - Conflict resolution
  - Building trust and accountability
  - Balance of collaboration and control
- Salaried and third-party administrators
- Subcommittees.

**Lawrence J. Bradley**, Executive Secretary-Treasurer, National Electrical Benefit Fund, Rockville, Maryland

**William Einhorn**, Trustee, Pennsylvania Employees Benefit Trust Fund, Teamsters Health and Welfare and Pension Trust Funds of Philadelphia and Vicinity, Wayne, Pennsylvania

## **Communicating About Defined Contribution Plans in a Defined Benefit World**

Defined contribution (DC) plans are now a fundamental part of many people's retirement structure. In this session, we will cover the benefits and common mistakes participants make regarding the DC benefit plans you offer, including:

- Different avenues to retirement security
  - Blends of DB/DC plans
- Emerging trends in retirement benefits
- Behavioral decision making
  - Common allocation mistakes
  - Retirement investments and target-date funds.

**Matthew L. McMenemy**, Vice President and Business Development Manager, Wellington Management Co., Boston, Massachusetts

**Amanda J. Notaristefano**, Principal, The McKeogh Co, West Conshohocken, Pennsylvania

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

## **Lunch**

## TUESDAY | June 30 *(continued)*

**Concurrent Sessions** | 1:15-2:30 p.m.

### **Successorship and Building an Effective Board of Trustees**

As Baby Boomers age and retire, many plans will have to look for new people to fill their roles in the coming years. Finding and training the next generation of new trustees is not an easy process, and in this session we will discuss what it takes to manage an effective board of trustees, with topics such as:

- Recruitment and cultivation of new trustees
  - How to find new people to serve as trustees
  - Successorship
- Transfer of knowledge and information
- Use of alternative trustees
- Use of professional trustees.

**Stephen J. O'Sick, GBA**, Fund Administrator, Bricklayers and Allied Craftworkers Local #2, New York Joint Benefits Funds, Albany, New York

**Donna L. Spagnola**, Co-Chair Employer Trustee, Teamsters Local 703 Pension & Health & Welfare Funds, Chicago, Illinois

**TBD**

### **Pharmacy Benefits**

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

- Specialty pipeline
- Potential plan hurdles for self-funded plans
- Pharmacogenetic drugs and testing
- Specialty trends, new technology and genetics and biosimilars
- How to save money.

**Eileen O. Pincay**, Vice President and Pharmacy Benefits Consultant, The Segal Group, New York, New York

**“Attending Trustees and Administrators is a must!”**

Paul Ferri  
Labor Trustee  
Waterfront Employers ILA P&W Fund  
Mt. Pleasant, South Carolina

**Concurrent Sessions** | 2:45-4:00 p.m.

### **Guided Open Forum—Trustees**

This session will be devoted to addressing challenges and opportunities with a panel of trustees and plan professionals who 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.

**William Einhorn**, Trustee, Pennsylvania Employees Benefit Trust Fund, Teamsters Health and Welfare and Pension Trust Funds of Philadelphia and Vicinity, Wayne, Pennsylvania

**TBD**

### **Guided Open Forum—Administrators**

This session will be devoted to addressing challenges and opportunities with a panel of administrators and plan professionals who 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.

**Lisa L. Kaiser, CEBS**, Fund Administrator, Plumbers & Pipefitters Local 189, Fund Administration Office, Columbus, Ohio

**Stephen J. O'Sick, GBA**, Fund Administrator, Bricklayers and Allied Craftworkers Local #2, New York Joint Benefits Funds, Albany, New York

**Carolyn J. Papuga**, Vice President of Operations/Administrator, Wilson-McShane Corporation, Kansas City, Missouri

### **Consolidations in the Health Care Industry**

What are we to make of the fact that health care consolidations are occurring at an increasingly fast rate? In this session, we will look at these consolidations and discuss how they affect our benefit plans, including:

- Insurance companies and HMOs
- Urban cost of health care vs. rural cost of health care
- Intensity of service and location of care
- Legal challenges to hospital network monopolies.

**Valerie B. Hovland**, Principal, Allotta Farley Co., L.P.A., Toledo, Ohio

## WEDNESDAY | July 1

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6:30-11:30 a.m.

### **Registration/Information**

6:30-7:30 a.m.

### **Continental Breakfast**

7:30-8:45 a.m.

### **Marijuana Law Update**

As more states legalize the use of recreational marijuana, our benefit plans are put in the difficult position of how to handle the onslaught of new laws and regulations. In this session, we will discuss this new legislation and how our benefit plans are responding to these changes. Topics include:

- Overview of the state marijuana laws
- Legal conflicts between federal and state laws
- Employment challenges involving legalized marijuana
- How new marijuana laws affect benefit plans.

**Diana M. Bardes**, Partner, Mooney, Green, Saindon, Murphy & Welch, P.C., Washington, D.C.



9:00-10:15 a.m.

## Resiliency and Mental Health

How we handle hardship and stress can have a major effect on our personal and professional lives. And as trustees and administrators, we have a role to play in what services we offer to plan participants to help them deal with stressors in a healthy and productive way. In this session, we will cover:

- Different types of stressors
  - Mental and physical reactions and how they affect your decisions
- Employee assistance programs (EAPs)
- Mental health tool kit—First aid
- Innovative approaches.

**Nancy Spangler, Ph.D., OTR/L**, President, Spangler Associates, Inc., Leawood, Kansas

10:30-11:45 a.m.

## Running Effective Trust Fund Meetings

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

- Process and policies
- Being prepared—Getting the materials out on time for the meeting
- Delegation and subcommittees
- How to utilize your professionals
- Small-fund vs. large-fund meetings.

**Steven Ostrander**, Fund Administrator, United Association of Plumbers, Pipefitters and Service Techs Local 13, Rochester, New York

**“The Trustees and Administrators Institute is a great program with a lot of valuable information.”**

Pamela G. Robinson  
Trustee  
AFSCME DC 47 H&W Fund  
Philadelphia, Pennsylvania

# Hotel Information



## Hilton San Francisco Union Square

June 29-July 1, 2020

San Francisco, California

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 \$289 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 22, 2020.

### 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 & Auditing— Institute for Employee Benefit Plans

*Held in conjunction with the Trustees and Administrators Institute*  
June 29-July 1, 2020

The DOL's focus on audit quality demands a commitment to education. The Accounting and Auditing Institute is the premier learning opportunity for those who audit employee benefit plans. Planned by industry practitioners, this conference will keep you up to date on the latest accounting rules, reporting and disclosure requirements, and the changing benefits industry. 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 20NEWG1 when registering.

## Schedule

Sunday, June 28, 2020 | 8:00 a.m.-1:00 p.m.

Preconference: Traps, Tricks and Deception—  
Protecting Your Fund From High-Cost Cyber Risks

Monday, June 29, 2020 | 7:30 a.m.-4:00 p.m.

Tuesday, June 30, 2020 | 7:30 a.m.-4:00 p.m.

Wednesday, July 1, 2020 | 7:30-11:45 a.m.

## Sessions Include

- Economic Update
- Withdrawal Liability
- Reading and Understanding the Actuarial Report
- Accounting and Auditing Update
- Cybersecurity
- Hard-to-Value Assets
- DOL Update
- Understanding Peer Review
- Risk Assessment—  
Back to Basics
- Data Analytics
- Guided Open Forum
- Claims Auditing and Data Analytics
- Working in a Virtual Environment
- Auditing Contributions
- Emerging Issues/Best Practices

# Related Reading

## **Trustee Handbook: A Guide to Labor-Management Employee Benefit Plans**

Eighth Edition

*Lawrence R. Beebe, Editor and Contributor*

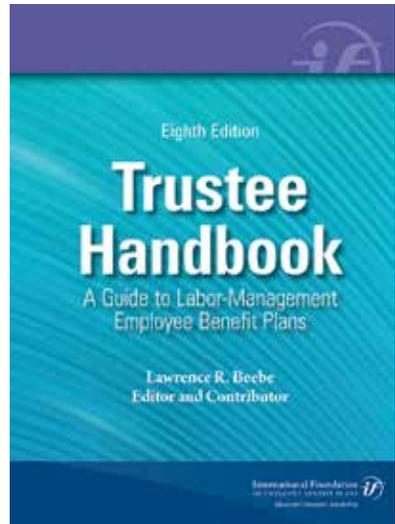
The essential reference tool for trustees, administrators and others who serve multiemployer benefit plans, this book includes a collection of practical articles covering:

- Fiduciary responsibility
- Plan design and financing
- Plan administration
- Liability insurance
- Actuarial considerations
- Accounting
- Investment management
- And much more.

(International Foundation)

529 pages. 2017. Item #7761.

\$128 (Members: \$85). Price includes shipping and handling.



### **Ordering Is Easy!**



#### **ONLINE**

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



#### **CALL**

(888) 334-3327,  
option 4



#### **EMAIL**

[bookstore@ifebp.org](mailto:bookstore@ifebp.org)

# 66th ANNUAL Employee Benefits Conference

November 15-18, 2020  
Honolulu, Hawaii | Hawaii Convention Center  
Preconference: November 14-15, 2020

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

**The 66th Annual Employee Benefits Conference is the largest gathering of multiemployer and public employee benefit plan representatives.** This must-attend event offers you the opportunity to network with your peers, be surrounded by industry experts and learn the latest in the industry so you can make the most informed decisions on behalf of your funds.



# Exhibit and Sponsorship Opportunities

Do you have a service provider that could benefit from exhibiting at or sponsoring the Trustees and Administrators Institute? 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 June institute.

## Benefits of *Exhibiting* at the Trustees and Administrators Institute

The exhibit hall at the Trustees and Administrators Institute 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!***



**Contact us for full details!**

### ***For Exhibits***

Sandra Lange

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

### ***For Sponsorships***

Diane Mahler

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

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

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 benefits decision makers 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 seven smaller conferences within the year. Sign up early for the greatest impact. Request a sponsor brochure for more details.
- **Sponsor representative(s) register and pay appropriate fee to attend conferences.**



### Gold Sponsorships—\$5,000

#### *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 the 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

#### *Continental Breakfast*

- **Includes one complimentary conference registration**



### Bronze Sponsorships

#### *Refreshment Break*

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



## 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, or email [continuinged@ifebp.org](mailto:continuinged@ifebp.org).



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

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 2020 policy, see [www.ifebp.org/policies](http://www.ifebp.org/policies).

## JOIN US ONLINE



# REGISTRATION/2020

Trustees and Administrators Institute

International Foundation OF EMPLOYEE BENEFIT PLANS 

### Attendee Information (Please print clearly)

Source code **2009 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 \$1,065

### 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 29-July 1, 2020 • San Francisco, California (Late fee after May 18, 2020) (#09-2009NT)

	Early fee		Late fee	
	Member	Nonmember	Member	Nonmember
Registration fee .....	<input type="checkbox"/> \$1,550	<input type="checkbox"/> \$1,880	<input type="checkbox"/> \$1,850	<input type="checkbox"/> \$2,180
Sunday preconference fee .....	<input type="checkbox"/> \$ 465	<input type="checkbox"/> \$ 575	<input type="checkbox"/> \$ 615	<input type="checkbox"/> \$ 725

### New Trustees Institute—Level II: Concepts in Practice

June 27-28, 2020 • San Francisco, California (Late fee after May 18, 2020) (#09-2009N7)

	Early fee		Late fee	
	Member	Nonmember	Member	Nonmember
Registration fee .....	<input type="checkbox"/> \$1,550	<input type="checkbox"/> \$1,880	<input type="checkbox"/> \$1,850	<input type="checkbox"/> \$2,180

### Trustees and Administrators Institute

June 29-July 1, 2020 • San Francisco, California (Late fee after May 18, 2020) (#09-2009)

	Early fee		Late fee	
	Member	Nonmember	Member	Nonmember
Registration fee .....	<input type="checkbox"/> \$1,550	<input type="checkbox"/> \$1,880	<input type="checkbox"/> \$1,850	<input type="checkbox"/> \$2,180
Sunday preconference fee .....	<input type="checkbox"/> \$ 465	<input type="checkbox"/> \$ 575	<input type="checkbox"/> \$ 615	<input type="checkbox"/> \$ 725

### Hotel

**Hilton San Francisco Union Square \$289 single/double**  
**Reservation deadline is May 22, 2020. (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 \_\_\_\_\_
- Licensed in the state(s) of \_\_\_\_\_
- License/NPN/BAR/CPA # \_\_\_\_\_

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

\*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

**Cancellation fees apply. 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 Pension Assets
- Governance

## **Trustees and Administrators Sessions Include:**

- Economic Update
- Political and Legislative Changes in Health Care
- Wellness Programs—Are They Working for Your Fund?
- Retirement Insecurity—Diagnosis of the Retirement Landscape
- Opioid Epidemic
- Innovations in Digital Health Care for Families
- Successorship and Building an Effective Board of Trustees
- Marijuana Law Update
- Resiliency and Mental Health
- Running Effective Trust Fund Meetings

**Register by May 18, 2020 to save \$300 on February Institutes with the early registration discount!**

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



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

**Priority Code: 2009 W**

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OF EMPLOYEE BENEFIT PLANS