

Investments Institute

April 22-23, 2026

Omni Austin Hotel Downtown
Austin, Texas

Securing Tomorrow's Investments Today



www.ifebp.org/investments

International Foundation
OF EMPLOYEE BENEFIT PLANS 

Investments Institute

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Securing Tomorrow's Investments Today

The year ahead is poised to bring meaningful changes for institutional investors. Market uncertainty remains a dominant theme, shaped by inflation, liquidity concerns, geopolitical risk and a rapidly evolving global economy. As a fiduciary, your role is not just to understand these shifts but to position your funds to benefit from them while protecting and enhancing returns for your plan members.

The Investments Institute delivers relevant sessions and insights, led by industry experts. You'll gain the knowledge, strategies and confidence needed to navigate the challenges ahead and ensure your fund's long-term success.

Who Should Attend

The Investments Institute is designed for individuals involved in setting investment policy for defined benefit and defined contribution retirement plans, health and welfare plans, and joint apprenticeship and training committees, including:

- Trustees
- Administrators and staff
- Corporate officers and executives
- Finance personnel.

Benefits of Attending

- Learn from highly regarded experts in the field of investing.
- Network with peers who are facing similar challenges.
- Hear current perspectives on the global economy.
- Discuss your fund's strategies with peers from other benefit plans.
- Take advantage of the intimate learning environment and get your specific questions answered.



Why You Need to Attend in 2026

If you're looking for a deep dive into timely topics, the **Investments Institute** is the place for you!

1. Learn From the Experts

You'll gain the knowledge, strategies and confidence needed to navigate the challenges ahead and ensure your fund's long-term success. Hear current perspectives on the global economy.

2. Quality Networking

Attendees will have direct contact with and access to industry professionals and their peers to find solutions and make lasting connections.

3. Get Your Questions Answered

The content is meant to take a deeper dive into investment institute topics in an intimate setting designed to answer the questions and address the obstacles your fund faces in your day-to-day operations.

4. Lasting Investment in Education

Attendees will walk away with access to all conference session presentations and takeaways for 90 days to utilize as a lasting postconference resource.



SESSIONS AT A GLANCE

Breakfasts, lunches and welcome reception included!

WEDNESDAY April 22, 2026	
8:15-9:30 a.m.	Markets in Transition: What to Look for Over the Next Year
9:45-10:45 a.m.	Smart Asset Allocation for Uncertain Times
11:00 a.m.-12:00 noon	Private Markets at a Crossroads
1:00-2:00 p.m.	Bricks and Mortar, Market Shifts: The Future of Real Estate Investing
2:15-3:15 p.m.	Infrastructure and Public–Private Partnerships: Building Resilient Portfolios
3:30-4:30 p.m.	Portfolio Case Study Roundtables
THURSDAY April 23, 2026	
8:30-9:30 a.m.	From Buzz to Portfolio Impact: AI in Institutional Investing
9:45-10:45 a.m.	Fixed Income’s Role in Volatile Markets
11:00 a.m.-12:00 noon	Austin to Auckland: Opportunities in Global Markets
1:00-2:00 p.m.	The True Cost of Investing: Understanding Benchmarking and Fees
2:15-3:15 p.m.	Paying Out Without Paying the Price: Decumulation for Multiemployer Plans

(All times are listed in Central Standard Time.)

Register online at
www.ifebp.org/investments.

PROGRAM SCHEDULE

(All times are listed in Central Standard Time.)

TUESDAY, April 21, 2026

3:00-5:00 p.m.

Registration/Information

WEDNESDAY, April 22, 2026

7:30-8:15 a.m.

Registration/Information

7:30-8:15 a.m.

Continental Breakfast

8:15-9:30 a.m.

Markets in Transition: What to Look for Over the Next Year

Because of inflation, trade policies and global markets are recalibrating. This market update will unpack the economic signals trustees should monitor to guide long-term fund stability.

9:45-10:45 a.m.

Smart Asset Allocation for Uncertain Times

Trustees face fast-moving markets and must reassess asset mix and liquidity. Learn how to balance growth and risk, set rebalancing guardrails and use diversifiers to keep the plan on track.

WEDNESDAY, April 22, 2026 *(continued)*

11:00 a.m.-12:00 noon

Private Markets at a Crossroads

With private markets now overtaking public markets in many portfolios, trustees need to understand how slowing distributions and liquidity pressures are testing investors' patience. This session will cover how private equity managers and trustees are adapting to tighter cash flows, the rise of secondaries and changing valuation dynamics. It will also examine what these shifts mean for long-term allocation, pacing and plan liquidity management.

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

Lunch

1:00-2:00 p.m.

Bricks and Mortar, Market Shifts: The Future of Real Estate Investing

From office building downturns to the surge in industrial and multifamily housing, real estate is at an inflection point. This session will explore how trustees can balance long-term stability while mitigating risk by reassessing portfolio exposure, monitoring manager performance and identifying opportunities in emerging sectors that align with fund objectives.

2:15-3:15 p.m.

Infrastructure and Public–Private Partnerships: Building Resilient Portfolios

Public–private partnerships and infrastructure projects are gaining momentum as viable investments. Learn how trustees can evaluate opportunities, measure risk and return, and ensure infrastructure aligns with plan objectives.

WEDNESDAY, April 22, 2026 *(continued)*

3:30-4:30 p.m.

Portfolio Case Study Roundtables

This highly interactive session will feature cross-sector case studies and allow trustees to share how they would navigate evolving investment issues. The session encourages peer-to-peer discussion and the exchange of real-world decision-making experiences.

4:30-5:30 p.m.

Welcome Reception (Guests Welcome)

Refreshments and light hors d'oeuvres will be served.

Register online at
www.ifebp.org/investments.



THURSDAY, April 23, 2026

7:30-8:30 a.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

From Buzz to Portfolio Impact: AI in Institutional Investing

Artificial intelligence is reshaping how investment decisions are made, from manager research and portfolio construction to market analysis. This session explores how trustees can assess the growing use of AI in investment strategies, understand its opportunities and limitations, and ensure fiduciary responsibility remains at the center of decision making.

9:45-10:45 a.m.

Fixed Income's Role in Volatile Markets

Fixed income is back in focus. This session looks at derisking strategies and how trustees can use bonds and credit to provide stability without sacrificing opportunity. Discussion will also address how changing interest rates, inflation trends and global debt markets are reshaping the role of fixed income in long-term plan strategy.

11:00 a.m.-12:00 noon

Austin to Auckland: Opportunities in Global Markets

As the U.S. market concentration in a small number of companies grows and geopolitical shifts reshape global trade, trustees must look beyond domestic borders for opportunity. Explore how global and emerging markets are able to strengthen diversification and improve long-term portfolio resilience.

THURSDAY, April 23, 2026 *(continued)*

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

Lunch

1:00-2:00 p.m.

The True Cost of Investing: Understanding Benchmarking and Fees

Trustees face increasing pressure to justify investment costs. This session will review how to assess and compare fees across asset classes, ensure costs align with performance and plan objectives, and benchmark expenses effectively to identify when your fund may be paying more than necessary for similar results.

2:15-3:15 p.m.

Paying Out Without Paying the Price: Decumulation for Multiemployer Plans

With more members entering retirement, trustees must rethink how plan assets can support lifetime income without eroding plan stability. This session will examine practical decumulation strategies used by funds, including liability-driven investing, sustainable withdrawal methods and effective communication planning to help members make informed retirement decisions.

Register online at
www.ifebp.org/investments.

Hotel Information

Omni Austin Hotel Downtown Austin, Texas

Reservation Deadline: March 23, 2026

Rates: US\$299.00 single/double occupancy
(Additional US\$20/person per night for a third
and/or fourth guest)

Hotel Accommodations

Resort Fees: US\$12/night (reduced from
US\$22/night)

Hotel Cancellation Policy: Hotel deposit
forfeited for reservations canceled within 72 hours
prior to arrival.

For additional hotel information, visit our Hotel/
Travel tab at www.ifebp.org/investments.

**Note: Hotel room availability is not guaranteed outside of scheduled program dates.*



Hotel Details

Renewed in midcentury style, this downtown Austin hotel offers vibrant color and playful details from the lobby to your guest room. Walk to the Austin Convention Center or the Texas State Capitol for business. Just blocks away, dive into Austin's nightlife and hear live music in entertainment hotspots including Sixth Street, Rainey Street and the Red River Cultural District. There's no better place to experience the energy of the Texas capital than from the Omni Austin Hotel Downtown.

Location Details

One of the fastest growing cities in the United States, Austin is an exciting place to be, with multinational tech companies setting up shop here. Austin is also home to some of the most well-known live music festivals, such as South by Southwest and Austin City Limits. Most importantly, Austin provides a food and drink experience unmatched by many cities in the U.S.—from food truck tacos to BBQ brisket joints and local craft breweries. Stroll down Sixth Street and experience the best in Austin nightlife.

Sponsorship Opportunities

Sponsors will gain valuable exposure for their organizations when they network with **experienced** trustees, administrators, corporate officers and finance personnel who are involved with setting and managing their investment policies for both defined benefit and defined contribution plans.

Sponsorship Levels

Gold | *Attendee Lunch* *Welcome Reception*
Conference App *Spotlight Sponsorship*
Lanyards

Sponsors receive one complimentary registration.

Silver | *Continental Breakfast*
Refreshment Break
Design Your Own Wellness Sponsorship
(a fitness activity or provide a healthy snack)
Pens/Highlighters
Notepads
Hand Sanitizers
Sponsor-Provided Item

Sponsors receive one conference registration at 50% off.

Sponsorships at each level are recognized in a variety of ways, including on the conference web page and in preconference promotions, on conference signage and table tent cards at the sponsored event, with a company listing on the conference app, with **complimentary or discounted conference registrations, and more!**

Contact us today! Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Learn more at www.ifebp.org/sponsorships.

Health Care Management Conference

Looking to extend your education? Attend the **Health Care Management Conference**, held immediately before the Investments Institute.

Monday, April 20-Tuesday, April 21, 2026

Omni Austin Hotel Downtown | Austin, Texas

Health fund fiduciaries are on the front lines of a rapidly shifting health care environment. They are tasked with balancing the needs of participants and the sustainability of their funds. Fulfilling these duties in the face of new therapies, aging plan populations and double-digit annual cost increases requires stakeholders to be nimble.

This year's conference will take a proactive approach to coverage, allowing attendees to identify trends that are driving cost and impacting outcomes while adapting to the unknown. Conference sessions will be hands-on and practical, combining lectures, interactive case studies and roundtable discussions. Each session has formal learning objectives to clearly communicate outcomes. Attendees will have direct contact with peers and industry professionals to ensure that their needs are met.

Content Designed for Your Role

- Trustees of multiemployer trust funds of any size
- Third-party and salaried administrators and key staff
- Members of bargaining committees
- Fiduciaries, staff and trustees from governmental plans

Register today at www.ifebp.org/healthcare.

ATTEND BOTH PROGRAMS AND SAVE US\$500!

SESSIONS AT A GLANCE

MONDAY April 20, 2026	
8:30-9:30 a.m.	Adapting to a Shifting Landscape—Federal Implications
9:45-10:45 a.m.	Adapting to a Shifting Landscape—State-Level Implications
11:00 a.m.-12:00 noon	Prescription Drug Pipeline—What’s Coming Next?
1:00-2:00 p.m.	Weight-Loss Offerings—Balancing Cost and Results
2:15-3:15 p.m.	Mental Health and Substance Use Disorder Benefit Update
3:30-4:30 p.m.	Fraud Prevention Initiatives—Protecting Plan Assets
TUESDAY April 21, 2026	
8:30-9:30 a.m.	Using Plan Data to Improve Outcomes
9:45-10:45 a.m.	Cost Containment— Who Are You Paying, and What Are You Paying For?
11:00 a.m.-12:00 noon	Navigating Health Claim Denials
1:00-2:00 p.m.	Hot Topics in Health—Speaker Debates
2:15-3:15 p.m.	Preventive Services—Accessing Vital Information
3:30-4:30 p.m.	Advancements in Care—Success Stories

(All times are listed in Central Standard Time.)

Plan Ahead



MAY 2026

- 18-19 **Washington Legislative Update**
Washington, D.C.
www.ifebp.org/washington



JUNE 2026

- 15-17 **Accounting and Auditing Institute for Employee Benefit Plans**
San Diego, California
Virtual Option Available
www.ifebp.org/accounting
- 15-17 **Advanced Trustees and Administrators Institute**
San Diego, California
www.ifebp.org/junetrustees



JULY 2026

- 28-30 **Annual Wellness Summit**
Nashville, Tennessee
www.ifebp.org/annual-wellness-summit

AUGUST 2026

- 23-26 **45th Annual ISCEBS Employee Benefits Symposium**
Phoenix, Arizona
www.ifebp.org/symposium

OCTOBER 2026

- 25-28 **72nd Annual Employee Benefits Conference**
New Orleans, Louisiana
Virtual Option Available
www.ifebp.org/usannual

72nd ANNUAL
Employee Benefits Conference
October 25-28, 2026 | New Orleans, Louisiana
Preconferences: October 23-25
www.ifebp.org/usannual

The banner features a dark blue and purple diamond-patterned background. On the right side, there is a stylized graphic of a fleur-de-lis in yellow, green, and purple. The text is in white and yellow, providing details about the 72nd Annual Employee Benefits Conference.

REGISTRATION

Register today at www.ifebp.org/investments.

CONFERENCE REGISTRATION FEES

Through March 11, 2026	Member: US\$1,795 Nonmember: US\$2,015
After March 11, 2026	Member: US\$2,095 Nonmember: US\$2,315

Save US\$300 when you register before March 11!

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%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency. More information is available at www.ifebp.org/ce.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.



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

INTERNATIONAL FOUNDATION MISSION

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.



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Austin, Texas

Register by March 11 to
save US\$300 with the early
registration discount!



Visit www.ifebp.org/investments to register.



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International Foundation
OF EMPLOYEE BENEFIT PLANS



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