

Trustees & Administrators Institutes

February 21-25, 2026

Disney's Yacht & Beach Club Resorts
Orlando, Florida

June 13-17, 2026

Hilton San Diego Bayfront
San Diego, California

www.ifebp.org/trusteesadministrators

Educated
Trustees.



Trustees.



Stronger
Plans.

Trustees & Administrators Institutes

The **Trustees and Administrators Institutes** conference is offered each year in February and June. As one of the Foundation's longest running and most popular programs, the Institutes offers learning opportunities for multiemployer trustees, administrators and plan professionals at all levels. Choose the educational track and location that works best for you.

There is one thing you can count on in these challenging times—the International Foundation's commitment to delivering timely, relevant and balanced education on the trends, issues and future direction of the industry that you need to succeed. Don't miss this time-honored educational event—**Register Today!**

The main conference runs February 23-25 in Orlando or June 15-17 in San Diego and offers two tracks. You must register for one, and there is no cross attendance allowed between the two tracks.

- **Advanced Trustees and Administrators Institute** covers hot topics in benefits and is designed for those who have three or more years of experience. See details on page 6.
- **New Trustees Institute—Level I: Core Concepts** is for trustees who are new to serving on a multiemployer trust fund, usually within the first three years of service. Trustees who have served for more than three years but have never attended a Foundation educational program will also benefit from New Trustees Institute—Level I. The course covers the key areas of responsibility in your role as a trustee. See details on page 14.

Preconference Educational Opportunities (separate registration required):

- **NEW! Multiemployer Plan Administration**—This new two-day course is being offered February 21-22, 2026 in Orlando for both salaried and third-party administrators of multiemployer plans. The course will take a deep dive into the fundamentals of multiemployer plans, strategically and operationally. See details on page 22.
- **Trustees Institute—Level II: Concepts in Practice** will be offered on Saturday and Sunday, February 21-22 and June 13-14, 2026. This course takes a deeper dive into the content covered in the Level I course. Having the Level II program on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. See details on page 19. This course is only open to those who have completed the New Trustees—Level I course.
- **The Sunday preconference, The Leadership Mindset: Advancing Clarity, Connection and Courage**, is offered on February 22 and June 14, 2026 from 8:00 a.m.-1:00 p.m. For a full description of the Sunday preconference option, see page 24.

Why You Should Attend

- Fulfill your fiduciary duty or obligation to your clients to be informed and educated on the important issues facing your fund, the employee benefits industry and your members.
- Interact with and learn from industry experts about the current state of affairs, trends and newest initiatives being implemented.
- Meet with industry vendors in the exhibit hall to explore new and innovative products and services that support your plan participants, improve your efficiency and increase productivity.
- Engage and network with peers to learn from their mistakes, benchmark your performance, and gather workable ideas and solutions to consider.
- 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.

Main Conference Information.....	Pages 6-18
Preconference Information.....	Pages 19-24
Colocated Programs	Pages 25-26
Hotel Information	Pages 27-28
Exhibit and Sponsorship Opportunities.....	Pages 29-30
Registration Information	Page 31
Policies and Continuing Education Information.....	Page 31

SESSIONS AT A GLANCE

PRECONFERENCES		
Trustees Institute—Level II: Concepts in Practice	Saturday, February 21, 2026 —8:00 a.m.-5:00 p.m. AND Sunday, February 22, 2026 —8:00 a.m.-4:00 p.m.	Saturday, June 13, 2026 —8:00 a.m.-5:00 p.m. AND Sunday, June 14, 2026 —8:00 a.m.-4:00 p.m.
Multiemployer Plan Administration	Saturday, February 21, 2026 —8:00 a.m.-5:00 p.m. AND Sunday, February 22, 2026 —8:00 a.m.-3:00 p.m.	
The Leadership Mindset: Advancing Clarity, Connection and Courage	Sunday, February 22, 2026 —8:00 a.m.-1:00 p.m.	Sunday, June 14, 2026 —8:00 a.m.-1:00 p.m.
ADVANCED TRUSTEES AND ADMINISTRATORS INSTITUTE		
MONDAY February 23 and June 15, 2026		
7:30-8:45 a.m.	Economic Update	
9:00-10:15 a.m.	How Changing Government Policy Is Impacting Benefits	
10:30-11:45 a.m.	Health Care Legal and Regulatory Update	Is the OCIO Model Right for Your Fund?
1:15-2:30 p.m.	Asset Allocation in Today's Climate	Administrative Issues in 401(k) Plans
2:45-4:00 p.m.	Litigation Risk for Employee Benefit Plans	The GLP-1 Craze
TUESDAY February 24 and June 16, 2026		
7:30-8:45 a.m.	Funding Strategies	Maximizing Your International Foundation Relationship
9:00-10:15 a.m.	Best Practices for Retirement Planning	Mental Health Benefits and Support
10:30-11:45 a.m.	Labor Management Industry and Scholarship Funds	Software Systems for Administrators
1:15-2:30 p.m.	Artificial Intelligence in Benefits	What's on the Horizon in Health Care
2:45-4:00 p.m.	How Robust Is Your Cybersecurity Program?	

ADVANCED TRUSTEES AND ADMINISTRATORS INSTITUTE *(continued)*

WEDNESDAY | February 25 and June 17, 2026

7:30-8:45 a.m.	Finding and Fighting Fraud in Benefits	Insurance Coverages You Should Have
9:00-10:15 a.m.	Trustee Best Practices	Administrators' Roundtable
10:30-11:45 a.m.	Healthy Choices to Improve Wellness	

NEW TRUSTEES INSTITUTE—LEVEL I: CORE CONCEPTS

MONDAY | February 23 and June 15, 2026

7:30-11:30 a.m.	Trustee Responsibility and Legal Environment	
12:30-4:30 p.m.	Investing Health and Welfare and Pension Assets	

TUESDAY | February 24 and June 16, 2026

7:30-11:30 a.m.	Governance	
12:30-4:30 p.m.	Overview of Health and Welfare Plans	

WEDNESDAY | February 25 and June 17, 2026

7:30-11:30 a.m.	Overview of Retirement Plans	
------------------------	------------------------------	--

Register Today! www.ifebp.org/trusteesadministrators

Advanced Trustees and Administrators Institute

February 23-25, 2026
June 15-17, 2026

The Advanced Trustees and Administrators Institute has a longstanding history of providing quality and relevant education to experienced multiemployer trustees and administrators. Immerse yourself in the deeper issues and hot topics of today, and don't forget to take a look at the preconference options to round out your education.

While this conference is open to all, it is designed for multiemployer trustees and administrators who have served for over three years and have completed the Foundation's New Trustees Institute—Level I: Core Concepts course or the Essentials of Multiemployer Trust Fund Administration course. Plan professionals and service providers have also found value in attending to keep abreast of benefits issues, learn alongside clients and obtain continuing professional education.

Preconference Options—Many attendees of the Trustees and Administrators Institutes find value in attending one of the preconference options on Saturday and/or Sunday. See page 19 for the Trustees Institute—Level II: Concepts in Practice course or page 24 for The Leadership Mindset: Advancing Clarity, Connection and Courage. A separate registration is required for either of the preconference options.

SUNDAY | February 22 *and* June 14, 2026

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

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

MONDAY | February 23 *and* June 15, 2026

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

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-8:45 a.m.

Economic Update

Understanding where the economy is and what might be coming down the road is key to your success in overseeing your pension and health and welfare assets, managing your work and workers, and planning for the future. The current economic environment is complicated at best in both in the U.S. markets and globally. This session will give you insights on key economic indicators and potential scenarios as government and regulators respond to economic activity. Topics include:

- Economic indicators
- Short- and long-term growth prospects
- Jobs
- The global economy.



Jack Manley

Executive Director and Global Market Strategist
JP Morgan Asset Management
New York, New York

9:00-10:15 a.m.

How Changing Government Policy Is Impacting Benefits

This session will provide insight into government policies on issues related to employee benefit plans. Discussion will consider the short- and long-term impacts on plans and on the workforce. Potential topics include:

- General economic matters—
Cryptocurrency, ESG, social
safety net programs
- Health issues—Vaccines, ACA
- Retirement issues—
Private equity in 401(k)
- Implications for trustees,
administrators and plan sponsors.

MONDAY | February 23 and June 15, 2026 *(continued)*

10:30-11:45 a.m. | *concurrent sessions*

Health Care Legal and Regulatory Update

This session will feature an overview of legislative and regulatory activity relating to employee benefit plans, including:

- The status of recent and proposed legislation and regulations
- Updates from EBSA, the DOL and IRS agencies
- Implications for trustees and administrators.

Is the OCIO Model Right for Your Fund?

While not for every fund, OCIO models have been used successfully by many funds to outsource their investment management. This session will explore how this model works in practice and address:

- Defining an OCIO
- Risks, pros and cons of outsourcing investment management
- Monitoring and accountability
- Implications for trustees.

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

Lunch in Exhibit Hall

MONDAY | February 23 and June 15, 2026 *(continued)*

1:15-2:30 p.m. | *concurrent sessions*

Asset Allocation in Today's Climate

Constructing a portfolio of investments to meet the future obligations of the fund and participants' needs is complex at best. Discerning and reacting to market data and performance requires constant education and engagement. Keep abreast of what's happening as you consider:

- Benchmarking investment data
- Investment vehicles—What's hot
- Risk, return and timing
- Portfolio management
- Investment policy statement.

Administrative Issues in 401(k) Plans

This session will dive into the administrative issues related to 401(k) plans. Discuss the policy, practice and current issues relating to:

- IRS vs. DOL regulations
- Compliance
- Educating employers and plan participants
- Fees.

2:45-4:00 p.m. | *concurrent sessions*

Litigation Risk for Employee Benefit Plans

There have been many high-profile legal cases that have garnered attention in the employee benefits industry. The risk of litigation has certainly risen over time. Learn the status of current litigation and what you should be doing as it relates to:

- Investments
- 401(k) plans
- Prescription drugs.

The GLP-1 Craze

GLP-1 drugs are one of the hottest class of drugs on the market today. This session will consider the pros and cons of GLP-1 drugs from the perspectives of patients and plans. Topics include:

- Outcomes
- Unintended consequences
- Cost
- Coverage options.

TUESDAY | February 24 and June 16, 2026

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

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-8:45 a.m. | *concurrent sessions*

Funding Strategies

This session is focused on best practices for funding your benefit plan, including:

- Reserve strategies and policies
- Benchmarking
- Stop-loss coverage
- Best practices
- Unique issues for health, retirement and apprenticeship funds.

Maximizing Your International Foundation Relationship

One of your fiduciary responsibilities is to be educated. This session will help you understand how to be deliberate about your learning, including how to:

- Get the most out of your education
- Plan your path of education
- Access the many member benefits you have available to you
- Obtain free resources.

9:00-10:15 a.m. | *concurrent sessions*

Best Practices for Retirement Planning

Benchmark your own retirement planning approach as you discuss best practices in:

- Preparing for and transitioning to retirement
- Switching from accumulation to decumulation
- Health care in retirement
- Government benefits
- Resources for smaller plans.

Mental Health Benefits and Support

The mental health crisis in the U.S. permeates all aspects of life and often shows up in the work environment. Having a comprehensive approach to providing support and benefits for mental health is crucial to your plan participants.

- The role of telehealth
- Peer support and EAP services
- Dealing with shortage of providers
- Educating members

TUESDAY | February 24 and June 16, 2026 *(continued)*

10:30-11:45 a.m. | *concurrent sessions*

Labor Management Industry and Scholarship Funds

Industry funds and scholarship funds are common in the Taft-Hartley world, but these funds operate differently than your traditional health or pension trust fund. This session will give you guidance relating to:

- Setup
- Funding
- Uses
- Reporting.

Software Systems for Administration

Representatives from benefits software providers have been invited to discuss issues of common concern with trustees and administrators. This session will feature a facilitated discussion on best practices, lessons learned from implementation, outstanding issues and future opportunities.

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

Lunch in Exhibit Hall

1:15-2:30 p.m. | *concurrent sessions*

Artificial Intelligence in Benefits

As artificial intelligence is taking hold in the business world, it is important to understand how it can be used in our industry. This session will address:

- Efficient use in administration
- Policies you should have
- Compliance issues
- Cybersecurity concerns
- Use of AI by your vendors and participants
- Best practices.

What's on the Horizon in Health Care

From new cancer treatments to specialty PBMs, there are many new developments in health care. Learn what's in the pipeline and how it may impact your plans and participants. Learn about:

- Promising treatment modalities
- Design trends
- Technology
- Pharma developments.

Trustees and Administrators Institutes

2:45-4:00 p.m.

How Robust Is Your Cybersecurity Program?

With the volume of cyberattacks occurring daily, protecting your assets is a never-ending task. Benchmark your cybersecurity program as you learn about:

- DOL guidance
- Training employers and participants
- Unique issues for pension, health and apprenticeship funds
- Penetration testing.

WEDNESDAY | February 25 and June 17, 2026

6:30-11:45 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m. | *concurrent sessions*

Finding and Fighting Fraud in Benefits

Your funds have a lot of money, which makes them a target for fraudsters. Learn about the latest techniques and revisit the more common methods that fraudsters are using to make your fund a victim. Take away an understanding of:

- Types of fraud
- How to find fraud
- Internal controls
- What to do when you find fraud.

Insurance Coverages You Should Have

Insurance is one of the primary risk management strategies you have in your toolkit. This session will review common coverages, options, benchmarking and compliance.

- Fiduciary liability
- General liability
- Cyber liability
- Stop-loss coverage
- E&O coverage

WEDNESDAY | February 25 and June 17, 2026 *(continued)*

9:00-10:15 a.m. | *concurrent sessions*

Trustee Best Practices

Bring your ideas and issues for discussion. This panel discussion will focus on best practices for trustees, addressing:

- Your role as a trustee
- What trustees can and can't do
- Having difficult conversations
- Exercising your oversight role
- Audience situations.

Administrators' Roundtable

This session will feature a discussion of issues of interest to administrators today. Come prepared to share your experience and contribute to the dialogue on decision-making structures, improving efficiency, resources for small fund offices and customer service. Plus, bring your own ideas for topics to be discussed.

10:30-11:45 a.m.

Healthy Choices to Improve Wellness

This session will focus on the connection that healthy choices, good nutrition and support programs have with improving the wellness of your members.



Kelly Springer, M.S., RD, CDN

Founder

Kelly's Choice, LLC

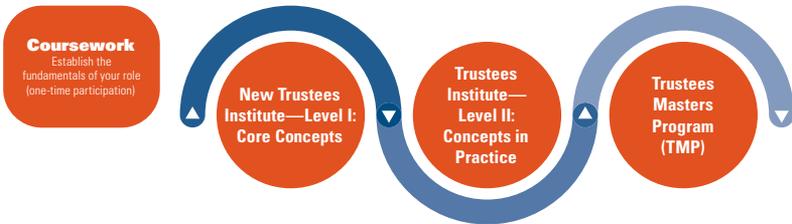
Skaneateles, New York

New Trustees Institute— Level I: Core Concepts

February 23-25, 2026
June 15-17, 2026

Designed for Taft-Hartley multiemployer benefit plan trustees, the New Trustees Institute—Level I: Core Concepts course encompasses five modules, covering the core areas of responsibility within the role of a trustee. Take away an understanding of the key issues in managing your retirement, health and welfare, or apprenticeship funds as well as the complexities of trust fund management and administration. Content is for those new to serving on a multiemployer trust fund, within the first three years of service, or trustees who have not previously attended a foundational education program. New Trustees Institute—Level I: Core Concepts is also ideal for collective bargaining and other personnel who work with trustees and want a better understanding of their role and responsibilities.

Multiemployer **Trustees and Fiduciaries** Education Path



Note: New Trustees Institute—Level I: Core Concepts is also offered each year as a preconference to the U.S. Annual Employee Benefits Conference. In 2026, the Institute will be held on October 23-25, 2026 in New Orleans, Louisiana.

Preconference Options

Many attendees of the New Trustees Institute—Level I: Core Concepts program find value in attending the Sunday preconference session as well. See page 24 for the session The Leadership Mindset: Advancing Clarity, Connection and Courage. A separate registration is required for preconference sessions.

Register online at www.ifebp.org/trusteesadministrators.

New Trustees Institute—Level I: Core Concepts Faculty

Troy Brown, CFA

Managing Director,
Institutional
Advisory Services
Mariner Institutional

Paul Catenacci, Esq.

Senior Partner
Novara Law Group PLLC

**Kelly S. Coffing,
EA, FSA, MAAA**

Principal and
Consulting Actuary
Milliman, Inc.

Tim Connor, FSA, EA, MAAA

Principal & Consulting Actuary
Milliman

Ian W. Jones

Senior Institutional Advisor
Mariner Institutional

Ron Laudel

Benefit Plans Administrator
(Retired) Mid-America
Carpenters Regional Benefit
Services, Inc.

Michael Ledbetter, CEBS

Partner
Ledbetter Partners LLC

Robert M. Projansky, Esq.

Partner
Proskauer Rose LLP

Dee Shaw

Health Benefit Consultant
Soshent Partners

Aaron Slaughter, CPA

Partner
Withum

Corey J. Wirth, CEBS

Executive Director
IBEW-NECA Service
Center, Inc.

SUNDAY | February 22 *and* June 14, 2026

7:30-8:00 a.m.

Sunday Preconference Registration

(for those who are registered)

8:00 a.m.-1:00 p.m.

Preconference Workshop:

The Leadership Mindset: Advancing Clarity, Connection and Courage

4:00-6:00 p.m.

Registration/Exhibit Hall Open/Welcome Reception

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

MONDAY | February 23 and June 15, 2026

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

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-11:30 a.m.

Trustee Responsibility and Legal Environment

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

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

4:30-5:00 p.m.

Networking Reception in Exhibit Hall

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

TUESDAY | February 24 *and* June 16, 2026

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

Registration/Information

6:30-7:30 a.m.

Continental Breakfast in Exhibit Hall

7:30-11:30 a.m.

Governance

- Financial statements
- Internal controls
- Administration
- Documents, records and meeting minutes
- Working with plan professionals
- Communication
- Best practices

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

Lunch in Exhibit Hall

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

WEDNESDAY | February 25 *and* June 17, 2026

6:30-11:30 a.m.

Registration/Information

6:30-7:30 a.m.

Continental Breakfast

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

Two-Day Preconference Options

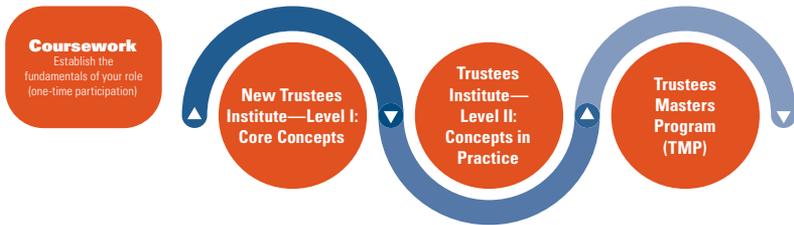
Trustees Institute— Level II: Concepts in Practice

February 21-22, 2026
June 13-14, 2026

Trustees Institute—Level II: Concepts in Practice is designed for Taft-Hartley multiemployer benefit plan trustees with three or more years of experience who have completed New Trustees Institute—Level I: Core Concepts. The curriculum will take a deeper dive into the benefits industry and your oversight role, with a focus on practical applications. This highly interactive learning experience will give you the framework and tools you need to address the many challenges you face as a trustee.

Having the Level II course on the weekend allows trustees who are also interested in attending the main conference to maximize their learning in one trip. Please note that a separate registration is required to attend both the Level II course and the Advanced Trustees and Administrators Institute.

Multiemployer **Trustees and Fiduciaries** Education Path



Note: Trustees Institute—Level II: Concepts in Practice is also offered each year as a preconference to the U.S. Annual Employee Benefits Conference. In 2026, the Institute will be held on October 24-25, 2026 in New Orleans, Louisiana.

Trustees Institute—Level II: Concepts in Practice Faculty

Lee Centrone

Senior Vice President
BeneSys

**Kevin Culp,
EA, FSA, MAAA**

Senior Consulting Actuary
Horizon Actuarial
Services, LLC

David P. Dorsey, CPA

Partner
Withum

**Mary Ann T. Dunleavy,
ASA, EA, MAAA**

Senior Consulting Actuary
Horizon Actuarial
Services, LLC

**Michael D. Joyce, Esq.,
CEBS**

Senior Vice President and
Senior Investment
Consultant
Segal Marco Advisors

Travis J. Ketterman, GBA

Partner
McGann, Ketterman & Rioux

**Stephanie Patrick,
FSA, MAAA**

Senior Consulting Actuary
Horizon Actuarial
Services, LLC

Andrew E. Staab

Vice President and
Senior Corporate Counsel
U.S. Bank National
Association

Nick S. Trella

Senior Vice President/
Principal
Segal Marco Advisors

SATURDAY | February 21 *and* June 13, 2026

7:00 a.m.-5:00 p.m.

Registration/Information

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)*

SATURDAY | February 21 *and* June 13, 2026 *(continued)*

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 | February 22 *and* June 14, 2026

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast in Exhibit Hall

8:00-11:30 a.m.

Retirement

- Financial literacy
- Defined contribution plans/annuities
- Pension basics
- PPA and MPRA
- Plan redesign
- Withdrawal liability
- Open forum

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

Lunch in Exhibit Hall *(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

Two-Day Preconference Options

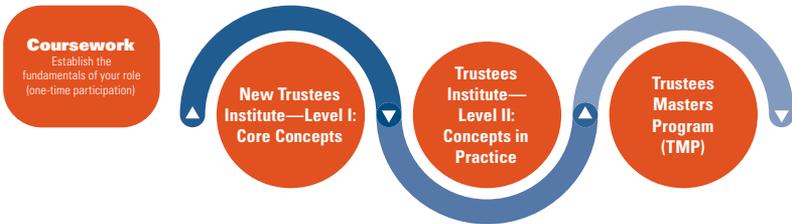
Multiemployer Plan Administration

February 21-22, 2026

Gather with your peers for this two-day course to learn and network while gaining insights on how to run your plans. Take a deep dive into the fundamentals of multiemployer plans with instructors who are experts in the field. Walk away with a more solid understanding of the basics as well as strategies to use at your fund for managing benefits for your members.

Having the Multiemployer Plan Administration course on the weekend allows administrators who are also interested in attending the main conference to maximize their learning in one trip. Please note that a separate registration is required to attend both the Multiemployer Plan Administration course and the Advanced Trustees and Administrators Institute.

Multiemployer **Trustees and Fiduciaries** Education Path



The Multiemployer Plan Administration course will also be offered September 30-October 1, 2026 at the Caribe Royale Orlando in Orlando, Florida.

SATURDAY, February 21, 2026

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

SATURDAY, February 21, 2026 *(continued)*

8:00 a.m.-12:00 noon

**Labor and Taft-Hartley History
Multiemployer Plan Regulators
Administrative Models and Roles**

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

Lunch *(provided)*

1:00-5:00 p.m.

**Governance
Trustee Relationship
Health, Retirement and Other Plans**

SUNDAY, February 22, 2026

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast in Exhibit Hall

8:00 a.m.-12:00 noon

**Administrative Investment Basics
Accounting for Plan Administration
Vendor and Plan Professional Management
Legal and Legislative Environments**

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

Lunch in Exhibit Hall *(provided)*

1:00-3:00 p.m.

Case Study Group Work, Presentations and Debrief

One-Day Preconference Workshop

The Leadership Mindset: Advancing Clarity, Connection and Courage

Sunday, February 22, 2026 | 8:00 a.m.-1:00 p.m.

Sunday, June 14, 2026 | 8:00 a.m.-1:00 p.m.

Many people in formal leadership roles do not provide solid leadership for their teams, and many people who do not have formal leadership titles exhibit the traits of courageous, high-capacity leadership. True leadership is not about a title; it's about effective thinking, emotional responsiveness and values-based decision making. It's about maximizing your own potential to serve others and call them to greatness.

Whatever your title, developing a leadership mindset will enhance your own individual performance in the workplace, contribute to the betterment of your team, and allow you and your team to more fully support your organization's mission. Developing a leadership mindset also enhances personal and professional relationships and makes work—and life—so much more fulfilling.

This session is designed to support anyone in any professional role as they enhance their leadership mindset and capacity through:

- Increased self-awareness and effective thinking
- Improved working relationships and team communication
- Enhanced ability to resolve differences and conflicts with others
- Greater ability to operate in alignment with purpose and values
- Using intentional listening and powerful questions to foster connection, trust and mutual understanding
- Implementing intentional self-development and team-building strategies to cultivate and sustain a thriving workplace culture.



Rebecca S. Johnson, M.S., CHWC

Co-Founder and Chief Integrator
ViDL Solutions Inc.
Seminole, Florida

The following program will be colocated at the Hilton San Diego Bayfront in June:

Accounting and Auditing Institute for Employee Benefit Plans

June 15-17, 2026 | Hilton San Diego Bayfront | San Diego, California

Virtual option available

Having the Trustees and Administrators Institutes and the Accounting and Auditing Institute for Employee Benefit Plans colocated in San Diego provides the opportunity for members in your organization to connect and network with other plan professionals, trustees and fund administrators. Encourage the accounting professionals on your fund to attend and stay up to date on the latest reporting and disclosure requirements and best practices in the accounting and auditing profession.

The program offers focused learning on the technical topics of greatest concern to the accounting and auditing profession. Learn best practices, interact with other professionals who face similar issues and fulfill your need for continuing professional education.

Topics to Be Discussed

- Economic and regulatory updates
- Audit practices and trends
- Industry best practices
- Technology
- Hot topics

Benefits of Attending

- Get the most up-to-date information on plan disclosure requirements.
- Understand the current issues that impact multiemployer pension and health and welfare plan audits.
- Network with your peers who face similar challenges, and brainstorm workable solutions.
- Take the opportunity to earn meaningful continuing professional education (CPE) credits.

Colocated Programs

The following program will be colocated at Disney's Yacht & Beach Club Resorts in February AND at the Hilton San Diego Bayfront in June.

Public Plan Trustees Institute—Level I

February 23-24, 2026 | Disney's Yacht & Beach Club Resorts | Orlando, Florida
June 15-16, 2026 | Hilton San Diego Bayfront | San Diego, California

Public Plan Trustees Institute—Level II

June 15-16, 2026 | Hilton San Diego Bayfront | San Diego, California

This new course is designed for public sector health and retirement trustees and other fiduciaries. As a replacement for the Certificate of Achievement in Public Plan Policy (CAPP[®]), this program is streamlined and more relevant than ever for trustees and other fiduciaries in the public sector. Each section will be led by industry experts, ready to help you apply the concepts you will learn to your real-world challenges and bring the value back to your organization.

For more information, visit www.ifebp.org/public.

LEVEL I

- Fiduciary Responsibility and Plan Governance
- Retirement Plans
- Health Plans
- Legal Environment

LEVEL II

- Public Plan Governance and Emerging Issues
- Investing Public Plan Assets
- Trustee Board Strategies
- Plan Administration and Communication Concepts

Disney's Yacht & Beach Club Resorts

Orlando, Florida
February 21-25, 2026

The February Trustees and Administrators Institutes will be held in the convention center at Disney's Yacht & Beach Club Resorts. The International Foundation has secured a low room rate of \$359 for institute attendees at Disney's Yacht Club Resort, adjacent to the convention center.

Evoking the timeless era of New England seaside hotels from the late 1800s, Disney's Yacht & Beach Club Resorts welcome guests into a world of hardwood floors, brass fittings and luxurious accommodations. Anchored along the shores of the 25-acre Crescent Lake, the resorts offer casual elegance combined with serene grounds and nautical touches that transport guests to another place and time. When seeking a little unique recreation, guests can soak up the sun on the white sand beaches lakeside or cool off at Stormalong Bay, a unique 750,000-gallon feature pool complete with water slide, sandy bottom, whirlpools and water current.

Reservation Deadline: Friday, January 30, 2026

Rate: \$359 single/double occupancy

Hotel reservations must be made directly with Disney's Yacht & Beach Club Resorts. Please contact them at (407) 939-4686 and mention the International Foundation to receive the conference rate.

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

Hotel Cancellation Policy: Hotel deposit forfeited for reservations canceled within eight days prior to arrival.

Hilton San Diego Bayfront

San Diego, California
June 13-17, 2026

The June Trustees and Administrators Institutes will be held at the Hilton San Diego Bayfront in San Diego, California. Rising above San Diego Bay and steps from Gaslamp Quarter, Petco Park and Rady Shell at Jacobs Park, Hilton San Diego Bayfront is the signature SoCal resort. Enjoy a tailored, urban and coastal experience with bright and unparalleled views in every guest room, relaxing amenities and locally inspired dining.

The International Foundation has secured a low room rate for institute attendees. You must book your room through the Foundation by indicating your needs on the registration form.

Reservation Deadline: Monday, May 11, 2026

Deposit: \$450

Rate: \$319 single/double occupancy

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

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

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



Making the Most of the Exhibit Hall

Maximizing Your Takeaways From Exhibitors

Exhibitors are more than just providers of swag; they are sources of industry knowledge, potential solutions and networking opportunities. With a strategy for conversations with exhibitors, you can turn the exhibit hall into one of the most valuable parts of your conference experience. Here are some suggestions for maximizing your time with these vendors:



Before the Conference

- **Review the exhibitor list.** Go through the list of participating companies before the event. Identify those with products and services that align with the needs of your plan members.
- **Set clear objectives.** Determine what you want to learn or gain from your identified exhibitors. It may be:
 - Finding a new vendor for a particular service
 - Discovering a new tool for a specific task
 - Getting a demo of a particular product feature
 - Researching a specific solution or technology
 - Connecting with a technical specialist or executive.
- **Prepare your specific, open-ended questions.**



Engaging at the Booth

- **Be strategic with your time.** The exhibit hall can be overwhelming. Prioritize visiting your preselected companies first.
- **Go beyond the giveaway.** While a cool pen is nice, your priority should be information. Engage with the booth staff and ask your prepared, targeted questions.
- **Share your context.** Briefly explain who you are and what challenges you are trying to solve. This helps the exhibitor tailor their information to your specific needs, making the conversation more valuable for you.
- **Ask for a demo.** Seeing a product in action is one of the best ways to understand its true value. Ask for a brief, personalized demonstration.
- **Get scanned and take notes.** Allow them to scan your badge (for follow-up) but also jot down the name and title of the person you spoke with and your key takeaway from the conversation. This will be invaluable for your follow-up.
- **Don't be shy.** Initiate conversations! Make eye contact and step up to a booth. Remember, the exhibitors are there specifically to talk to you.



For more information:

Request a **2026 U.S. Specialty Sponsorship** brochure for full details.
Contact Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

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 Trustees and Administrators Institutes.

Contact Us!

For Exhibits and Sponsorships

Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Benefits of Exhibiting

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 over 400 trustees, administrators and plan professionals who serve multiemployer benefit plans
- Secure quality leads—Attendees at each conference 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.

75%

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



Come Visit With Us!

The International Foundation of Employee Benefit Plans will have a booth at this year's June Trustees and Administrators Institutes. Our on-site experts are here to answer any questions and talk with you about additional educational opportunities that are right for you.

Ready to Reserve a Booth Space or Sponsorship?

Request a **2026 Exhibitor Brochure and U.S. Specialty Sponsorship Brochure** for full details. Contact Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Register online at www.ifebp.org/trusteesadministrators.

REGISTRATION

Go to www.ifebp.org/trusteesadministrators to register.

CONFERENCE REGISTRATION FEES

Advanced Trustees and Administrators Institute | New Trustees Institute—Level I: Core Concepts

Through January 12 or May 4, 2026
Member: \$1,795 | Nonmember: \$2,125

After January 12 or May 4, 2026
Member: \$2,095 | Nonmember: \$2,425

Separate registration for the preconferences is required.

Two-Day Preconference Course: Trustees Institute—Level II: Concepts in Practice

Through January 12 or May 4, 2026
Member: \$1,795 | Nonmember: \$2,125

After January 12 or May 4, 2026
Member: \$2,095 | Nonmember: \$2,425

Multiemployer Plan Administration

Through January 12, 2026
Member: \$1,495 | Nonmember: \$1,715

After January 12, 2026
Member: \$1,795 | Nonmember: \$2,015

Sunday Preconference Workshop: The Leadership Mindset: Advancing Clarity, Connection and Courage

Through January 12 or May 4, 2026
Member: \$560 | Nonmember: \$670

After January 12 or May 4, 2026
Member: \$710 | Nonmember: \$820

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 three days (eight days for Disney properties) of arrival. 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 with your registration for the program at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.

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 us at 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.



Join us in 2026 for this valuable education!

Trustees & Administrators Institutes



February 21-25, 2026

Disney's Yacht &
Beach Club Resorts
Orlando, Florida



June 13-17, 2026

Hilton San Diego Bayfront
San Diego, California

Visit www.ifebp.org/trusteesadministrators
for more information.

International Foundation OF EMPLOYEE BENEFIT PLANS



18700 West Bluemound Road
Brookfield, WI 53045

Nonprofit Org.
U.S. POSTAGE PAID
INTERNATIONAL FOUNDATION
OF EMPLOYEE BENEFIT PLANS



ED2512849

25M-1125