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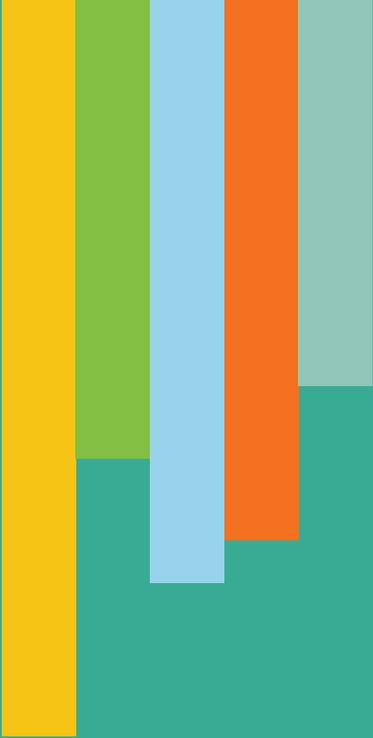
Membership Handbook

We Can't Wait to Help!

This guide outlines membership resources to help you stay compliant and create the best pensions and benefit offerings for your organization.

www.ifebp.org/membership

International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA



PENSIONS AND BENEFITS

YOU ARE PART OF SOMETHING BIG

The Foundation serves over 31,000 members like you throughout Canada and the United States, including:

- Trustees and administrators from multi-employer trust funds
- Benefits, compensation and human resources leaders from the private sector
- Public employee plan managers, administrators and trustees
- Service providers, including lawyers, actuaries, accountants, and others who work with benefit and compensation plans.

The Foundation depends on collaborative efforts between Canadian and U.S. board and committee volunteers, staff and members to stay ahead of industry issues and needs.

Over 180 trustees, administrators and benefits professionals serve within the volunteer Foundation board and committee structure and contribute their expertise to develop educational program content and other services.

6,700
Organizations



31,000
Individual members



25 million
Individuals across Canada
and U.S. impacted by the
reach of International
Foundation members

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.



**LET US
HELP YOU . . .**

STAY COMPLIANT

Stay ahead with pensions and benefits news stories, compliance alerts and industry updates with the members-only **TODAY'S HEADLINES** email. If you aren't receiving this email, check your profile and make sure you're subscribed. Trending topics the Foundation has been following include:

Pension funding

Mental health

Pension registration guidelines

Flexible schedules

Adoption assistance benefits

Infectious disease emergency leave

Surrogacy benefits

Employment contracts

Pension plan statement of investment

Fertility treatment benefits

Policies and procedures

Pay equity

Financial wellness

Pay transparency

Paid time off

Overtime pay

Sick leave

Artificial intelligence

Work-life balance

SAVE TIME

Save time by heading to the **BENEFITS KNOWLEDGE CENTER**. There, you will be able to:

- Let one of our information specialists handle your complicated benefits questions by using the **PERSONALIZED RESEARCH SERVICE**.
- Avoid starting from scratch by viewing sample policies, forms, checklists and other resources first in the **SAMPLE DOCUMENTS** section.
- Instantly access articles and webpages addressing over 100 frequently asked questions about industry topics, saving hours of searching time, with **INFOQUICK**.

Questions our members have requested personalized research on lately include:

- Do you have information about a total rewards strategy in Canada? I'm looking for benchmarking data or articles.
- What is Ontario's requirement for employer contributions to a group RRSP during the "notice period"?
- What benefits need to be extended to employees whom we have parted ways with during the lieu of notice period? I'm aware there are differences for each province.

Visit www.ifebp.org/benefitsknowledgecenter to learn more.

MAKE CONNECTIONS

Find your next great hire, develop your career as a benefits professional, learn the latest trends in benefits and get an idea of salaries in your field through **JOBS IN BENEFITS**. Visit www.ifebp.org/JobsInBenefits to explore more.

Find out what other employers are doing and easily compare your benefit offerings through niche **BENCHMARKING DATA**. View recent reports and findings at www.ifebp.org/research.

Talk directly with your peers and learn how they are taking action on similar issues, or keep an eye on the conversation to learn best practices through **FOUNDATION COMMUNITY**.



Foundation
COMMUNITY

Join the Foundation Community discussion group(s) relevant to your role.

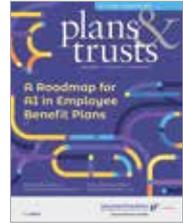
- Service Providers
- Global Benefits
- Canada

Sign Up

1. Visit www.ifebp.org/myprofile. Sign in.
2. Click “My Community” in the “Manage My Communications” tab.
3. Check the box for the group(s) you’d like to join.

LEARN FROM THE EXPERTS

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month. Read the next **PLANS & TRUSTS** issue at www.ifebp.org/magazines, or wait until it arrives in your mailbox!



Gain just-in-time information on developing benefit issues, delivered by experts through unlimited live and on-demand **WEBCASTS**. Visit www.ifebp.org/webcasts for a full listing.

RECENT WEBCASTS INCLUDE:



Securities Class Actions in Canada: Key Cases and Lessons for Trustees
disponible en français

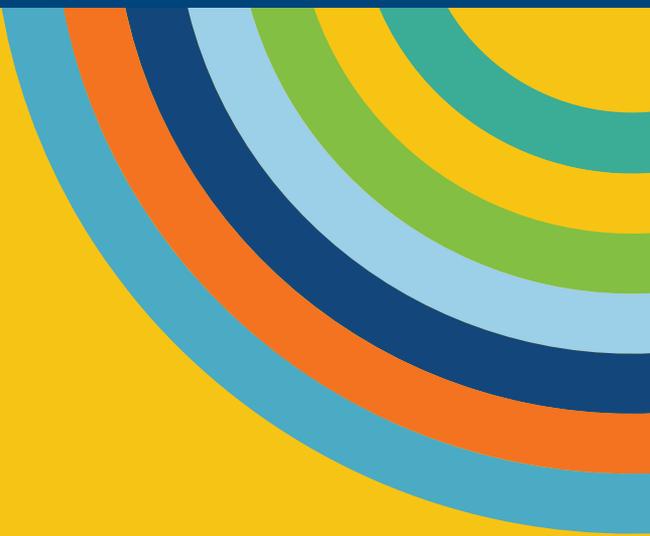


Creating a Culture of Ownership in the Era of AI



Early Action, Lasting Savings: Smarter Disability Management

www.ifebp.org/webcasts



TOOLKITS AND RESOURCES

TOOLKITS

Get quick, curated information on hot topics impacting our industry with new, member-exclusive **TOOLKITS**. Dig deeper into the following topics and view a full listing at www.ifebp.org/toolkits.

AI/ChatGPT

Apprenticeship

**Benefits Communication
for Plan Sponsors**

Benefits Industry Basics

Cybersecurity

**Diversity, Equity and
Inclusion**

**Employee Benefits in
Canada**

**Financial Education/
Retirement Security**

Trustee Resource Center

Workplace Mental Health

Workplace Wellness

Receive **DISCOUNTS** on conferences, courses and online education. You'll notice a special member price on nearly every educational event offered.

Not finding what you're looking for?

Let our benefits information specialists search for what you need.

Call: (833) 886-3749, option 5

Email: infocenter@ifebp.org

NEWS AND REGULATORY UPDATES

Be the first to know about regulations and legislation impacting the pensions and benefits landscape. Visit www.ifebp.org/news.

Regulations and Legislation:

- Legislative Scorecard
- Pension Legislative Update
- Regulatory Updates

News Updates:

- Paid Sick Leave
- Pension and Retirement Resources

READ ON

Word on Benefits® Blog: blog.ifebp.org

- The Looming Crisis: Who Will Care for Canada's Ageing Population
- Ontario's New Long-Term Illness Leave Takes Effect Soon: What Employers Need to Know
- Workplace Accommodations: Compliance Issues and Tips
- GLP-1 Drug Coverage Continues to Rise in Canada





QUESTIONS AND ANSWERS

Q: How do I access my member benefits online?

A: Many member benefits are available online with exclusive member access to areas of our website on www.ifebp.org. If you forget your username and/or password, recover/change it by using the log-in page, www.ifebp.org/login.

Q: If my organization purchased the individual membership for me and I leave the company, will I be able to take the membership with me?

A: When an organization pays for a membership, the organization is entitled to replace you if it wishes. Please call (833) 886-3749 to discuss your options for remaining a member.

Q: If someone at my organization has an individual membership, can it be upgraded to an organizational membership at any time?

A: Absolutely. Contact us at (833) 886-3749 and any membership assistant will be happy to help you upgrade your membership.

Q: Now that I am a member of the International Foundation, am I automatically enrolled in the CEBS program or ISCEBS?

A: The Certified Employee Benefit Specialist® (CEBS®) program is a designation program that is offered by the International Foundation. Starting the CEBS program is a separate process; membership in the Foundation is not required. The International Society of Certified Employee Benefit Specialists (ISCEBS) is a different membership offered to CEBS, CMS, GBA and RPA graduates and also to current CEBS students.

Q: What are my responsibilities as the primary contact for an organizational membership?

A: As the primary contact, you will receive the annual dues renewal invoice for the next calendar year. Included with the dues renewal will be the membership roster. The roster is a listing that shows your organization and contact information, followed by names of the active individuals. Be sure to contact us with any updates to the roster throughout the year.

Q: Can a nonmember serve as a primary contact for an organizational membership?

A: Yes. It is not required that the primary contact be an active member. You can designate any employee from your organization to handle your membership.

Q: Can two multi-employer trust fund boards be represented on one membership?

A: Separate memberships are to be taken out for funds that do not have identical boards. Members on a trust fund membership must work solely for the fund.

Q: If the membership is a multi-employer or public employee trust fund and is administered by a third-party administrator, can the representative from that organization be listed as an active member on the fund's membership? In addition, can the fund's lawyer be listed as an active member on the fund's membership?

A: For trust fund memberships, the administrator or lawyer must work solely for the fund. The third-party administrator or lawyer will need to take out a separate membership for their own organization.

Q: If we have a trust fund membership, can we add to our membership a trustee from another fund who is not an active member?

A: Often, funds do not have identical boards of trustees for their various plans. If this is the case, a separate membership would need to be taken out for each fund.

Q: Is there a preferred way to get a roster update or other written requests to the International Foundation?

A: There are a few options to update an organization's roster. The primary contact should include the organization membership number on all correspondence.

1. Access the "My Profile" area of our website at www.ifebp.org/myprofile.

The primary contact should log in to their individual account

record on our website to access the organizational account by selecting "Manage My Organization or Fund."

Please check the exact wording listed in the Primary Contact Record. We do not use ID#'s anymore for access.

2. Mail the roster to:
International Foundation of Employee Benefit Plans
Attn: Membership Dept.
P.O. Box 2506
Postal Station A
Toronto, ON M5W2K6 Canada

If a roster is not available:

Email a request to membership@ifebp.org.

Q: When I replace an individual on the roster with a new person, does the new person adopt the removed person's individual membership number?

A: No. The new person will be assigned a new number and will keep this number when moving to another company and becoming a member again in the future. An individual's membership number "travels" with the individual.

Q: Are we able to add to our membership a colleague who works with our company or fund but is not employed by us?

A: A colleague who works with your company or fund who is not employed by your company or fund will need to take out a separate membership for their own organization.

Q: Can I wait until dues are reduced each year instead of renewing at the full dues rate?

A: Reduced rates apply to new memberships only. If your membership expired more than 12 months ago, you are now eligible to rejoin at promotional rates as a new member.



CUSTOMIZE YOUR MEMBERSHIP EXPERIENCE

Review Your Profile Today

Make sure you are signed up to receive only the International Foundation communications you want by reviewing your profile. The information you provide is kept strictly confidential.

Visit www.ifebp.org/myprofile to get started!

