


60th Annual Employee Benefits Conference

October 12-15, 2014 | Preconference: October 11-12
Boston Convention and Exhibition Center
415 Summer Street | Boston, Massachusetts

 #IFEBP14

Full Program Agenda



www.ifebp.org/usannual

International Foundation 
OF EMPLOYEE BENEFIT PLANS
Education | Research | Leadership

60th Annual Employee Benefits Conference

October 12-15, 2014 | Boston, Massachusetts
Preconference Dates: October 11-12



Conference Overview	1
The Venue	
Conference Schedule	
Continuing Education	2
Validate Your Learning	3
Bookstore	4
Sponsorships	5
Exhibit Hall	6-7
Preconference	
Lifetime <i>Financial</i> Planning	8
Lifetime <i>Retirement</i> Planning	9
New Trustees Institute	10-11
CAPP® in Employee Pensions and Health	12-13
Administrators Masters Program	14-15
Trustees Masters Program	16-17
TMP Summit	18
Enrichment Workshops	19-22
Keynote and Featured Presentations	23
Conference Sessions	
Administration	24-25
Communication	26
Fiduciary Responsibility	27-28
General Topics	29-30
Health and Welfare	31-35
Investments	36-39
Pensions	40-42
Public Plans	43-44
Training and Education	45
Fund Professionals—Accountants	46
Fund Advisors—Attorneys	47
Open Forums	47
Conference Schedule	
Sunday/Monday	48-49
Tuesday	50-51
Tuesday/Wednesday	52-53
Session Recommendations	
New Trustees	54-55
Advanced Trustees	56-57
Public Sector	58-60
Acknowledgments	61
Policies	62
Shuttle Bus/Entertainment Guides	63
Boston Hotels	64
2014 Registration Form	Inside back cover

Visit www.ifebp.org/usannual for the latest Annual Conference information.

The Education

With over 100 sessions, the Annual Conference covers a wide variety of relevant topics in a well-balanced, objective format. Broad concepts like fiduciary responsibility and administration are addressed alongside specialty tracks on pensions, health and welfare, and training and education. Plenty of sessions at each skill level—basic, intermediate and advanced—guarantee your educational needs will be met, whether you are new to the field, a seasoned trustee or somewhere in between.

The Community

As a member-only opportunity, enjoy benefits beyond the education. With nearly 5,000 individuals in attendance each year, the Annual Conference is an unmatched opportunity for networking. You'll be able to learn alongside colleagues who share a sense of common purpose, including:

- Multiemployer fund trustees, administrators, business managers and association leaders
- Public sector plan trustees and staff
- Fund administrators and managers
- Third-party administrators (TPAs)
- Benefits consultants
- Attorneys/accountants/actuaries
- Investment managers and consultants
- Others who are involved in the overall management of benefit trust funds.

Your Registration Includes

- Conference credentials and briefcase
- Access to over 100 educational sessions
- Comprehensive take-home materials with resources and references
- Access to electronic handouts—in color
- Conference mobile app
- Insights from over 200 speakers
- Interactive workshops
- Extensive networking opportunities with nearly 5,000 attendees
- Entry to the exhibit hall and access to over 200 vendors
- Daily lunch breaks
- Morning refreshment breaks
- Welcome reception on Sunday evening

International Foundation Membership

Members of the International Foundation receive substantial discounts on most program registrations. Not a member? Consider the benefits of joining. In addition to receiving registration discounts, members gain access to a variety of valuable resources and services. See the registration form on the inside back cover for more information or visit www.ifebp.org/memberkit for details.

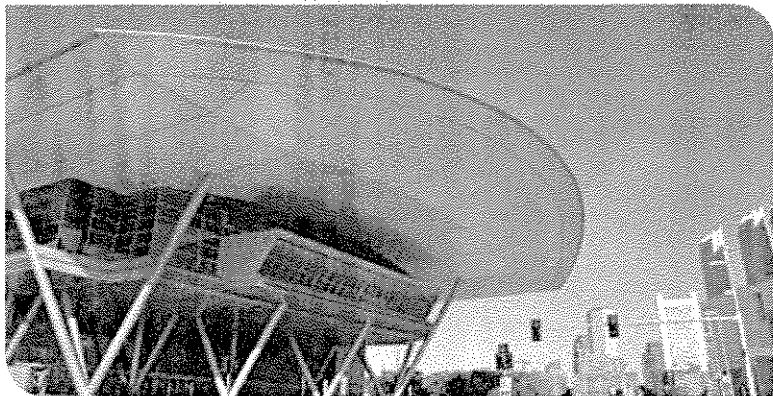
Connect With Us



#IFEBP14

The Venue

Boston Convention and Exhibition Center
415 Summer Street | Boston, Massachusetts



Enjoy the wonders of “America’s Walking City.” Rich with history, cultural attractions and countless dining venues, Boston is one of the great founding cities of America. The neighborhoods of downtown Boston offer endless unique experiences all within walking distance.

History

As one of the oldest cities in the United States, Boston is a city rich with history. The scene of multiple key events of the American Revolution—from the Boston Massacre to the Siege of Boston—Boston is also home to many firsts of our country, including the first public school system established in 1635 and the first subway system established in 1897.

Attractions

While in Boston, explore all this city has to offer and enjoy the numerous cultural attractions available. Some of the city’s most popular attractions include Fishermans Wharf, The Paul Revere House, Fenway Park, Boston Common and The Freedom Trail. Known as America’s Walking City, Boston offers many attractions that are easily accessed by foot.

Dining

The vibrant neighborhoods of downtown Boston offer countless dining experiences. Choose from award-winning restaurants to the mom-and-pop shops favored by locals all offering a variety of food to choose from—including fresh seafood brought in daily from the harbor.

Visit www.ifebp.org/usannual for the latest conference information!

Schedule

Friday, October 10

Registration 12:00 noon-5:00 p.m.
(Registration opens for 2015 Annual Conference in Honolulu, Hawaii)

Saturday, October 11

Registration 6:30 a.m.-5:00 p.m.
Preconference Programs 7:30 a.m.-5:00 p.m.

Sunday, October 12

Registration 6:30 a.m.-5:00 p.m.
Preconference Programs 7:30 a.m.-4:00 p.m.
Exhibit Hall* 12:00 noon-4:30 p.m.
Opening Session* **4:30-6:00 p.m.**
Welcome Reception* 6:00-7:00 p.m.

Monday, October 13

Registration 6:30 a.m.-4:30 p.m.
Keynote Session **7:30-8:45 a.m.**
Breakout Sessions 9:15 a.m.-4:15 p.m.
Exhibit Hall 10:30 a.m.-2:30 p.m.
Lunch (in Exhibit Hall) 11:45 a.m.-1:15 p.m.

Tuesday, October 14

Registration 6:30 a.m.-4:15 p.m.
Breakout Sessions 7:30 a.m.-4:00 p.m.
Exhibit Hall 10:30 a.m.-2:30 p.m.
Lunch (in Exhibit Hall) 11:45 a.m.-1:15 p.m.

Wednesday, October 15

Registration 6:30 a.m.-12:00 noon
Breakout Sessions 7:30-10:15 a.m.
Finale Session* **10:30-11:45 a.m.**

**Guests are welcome to attend.*

All attendees MUST be registered and must wear their name badges in order to attend sessions and enter the Exhibit Hall, unless indicated otherwise.

Continuing Education

Members who need continuing professional education credit for licensing or other reasons have the opportunity to satisfy their requirements by attending the Annual Conference.

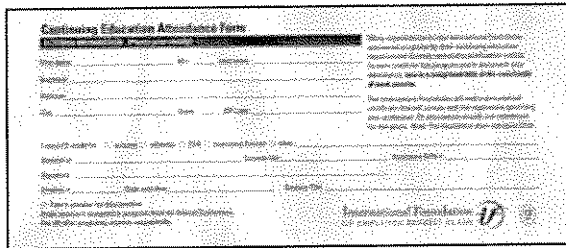
Continuing Education (CE) Registration

If you are interested in earning continuing education credit for your attendance, make sure you mark the Annual Conference registration form. A \$25 service charge is due at the time of your request (if applicable). Make sure to indicate your profession(s) and state(s) in which you are licensed.

CE Attendance Forms

Yellow CE attendance forms must be completed properly and submitted at the *conclusion of each session*.

- Request CE in advance in order to receive personalized attendance forms and a guide to approved sessions.
- OR**
- Request CE on site in the registration area and obtain blank forms. Make sure to fill out all forms completely.



The image shows a 'Continuing Education Attendance Form' with fields for Name, Title, Company, and State. It includes instructions for attendees to fill out the form at the end of each session. The form is provided by the International Foundation of Employee Benefit Plans.

On-Site Information

CE information and personalized assistance will be available on site at the CE table in the registration area. The International Foundation's CE administrator will be on hand to answer your questions. You may also contact the CE Department following the conference at (262) 786-6710, option 2, or e-mail continuinged@ifebp.org.

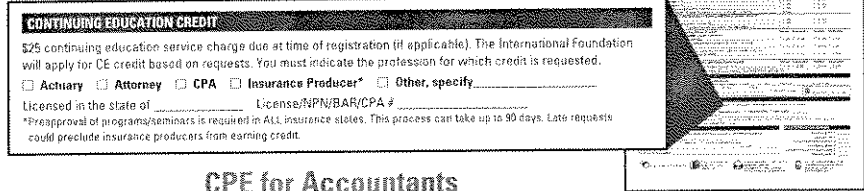
Insurance Credit

The Annual Conference will be submitted for insurance CE approval based on requests received on the conference registration form.

Approval is not automatically sought in all states. Register early to ensure program approval will be requested in your state. Only insurance-related topics will qualify and specific sessions need to be attended in order to earn credit. State approval information can be found on the CE website at www.ifebp.org/usannualCE and will also be available on site at the CE table.

MCLE Credit for Attorneys

Each state must review and approve the Annual Conference for CLE credit. A list of sessions recommended for CLE can be found at www.ifebp.org/usannualCE and will also be available on site at the CE table.



CONTINUING EDUCATION CREDIT
\$25 continuing education service charge due at time of registration (if applicable). The International Foundation will apply for CE credit based on requests. You must indicate the profession for which credit is requested.
 Actuary Attorney CPA Insurance Producer* Other, specify _____
Licensed in the state of _____ License/NPI/NBAR/CPA # _____
*Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Late requests could preclude insurance producers from earning credit.

CPE for Accountants

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



NASBA topic recommendations for the Annual Conference sessions can be found on our website at www.ifebp.org/usannualCE and will also be available on site at the CE table.

Investment Professionals

The Annual Conference has been submitted for continuing education to the CFP® Board of Standards and the Investment Management Consultants Association (IMCA) for approval of investments credit. A list of sessions approved for CFP® and CIMA® credit will be posted on our website at www.ifebp.org/usannualCE and will also be available on site at the CE table. Contact the Foundation's CE Department at (262) 786-6710, option 2, or e-mail continuinged@ifebp.org for information on how the 60th Annual Employee Benefits Conference could meet continuing education requirements for other professions.

IRS (ERPA/EA)



APPROVED
CONTINUING EDUCATION
PROVIDER

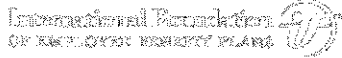
The International Foundation is an IRS-approved provider of continuing education. Enrolled actuaries (EA) and enrolled retirement plan agents (ERPA) can earn CE credit by attending the Annual Conference. Visit www.ifebp.org/usannualCE to view credit information.

Enrolled Actuaries—Recommendations for CORE and NONCORE credit will be provided at www.ifebp.org/usannualCE for download and will be available on site at the CE table.



CEBS continuing professional education (CPE) credit

Educational sessions at this program may qualify for CEBS CPE credit. CE attendance forms are not required to earn CEBS CPE credit; however, forms may be requested if you would like documentation of your credits earned. \$25 service charge does not apply to CEBS CPE. Visit www.cebscpe.org for more information on reporting CEBS CPE credit hours.



Search...

Home > Education > 60th U.S. Annual Employee Benefits Conference

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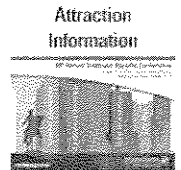
Sunday, October 12 - Wednesday, October 15, 2014
Boston Convention & Exhibition Center, Boston, MA

[Register Online](#) | [Register Fax/Mail](#)

Boston Convention and Exhibition Center | 415 Summer Street | Boston, Massachusetts 02210

For 60 years the International Foundation has provided a well rounded Annual Employee Benefits Conference offering over 100 sessions that provide the most timely and up-to-date information on subjects of greatest interest to our members.

Make plans now to attend the 60th Annual Employee Benefits Conference. You'll explore emerging trends, new ideas and gain information to assist you in meeting your fiduciary obligation as well as connecting with industry leaders and peers who are facing similar issues.



[FULL BROCHURE](#)

[PRECONFERENCE OPTIONS](#)

[KEYNOTE SPEAKERS](#)

[HOTEL INFORMATION](#)

Conference Tracks

Each year, 120-plus sessions are categorized into specific focus areas to help you build a personal conference itinerary that fits your needs. Sessions range in complexity from basic to advanced and our practical approach to scheduling includes repeat offerings of many sessions, giving you ample opportunity to attend the sessions that interest you the most. Session topics address timely issues that cover the following categories:

- Fiduciary Responsibility
- Health and Welfare
- Pensions
- Investments
- Communication
- Training and Education
- General topics
- Public Plans
- Administration/Technology
- Fund Professionals—Accountants
- Fund Advisors—Attorneys

Who Should Attend

- Taft-Hartley fund trustees, administrators, business managers and association leaders
- Public sector plan trustees, executive directors, administrators and staff
- Third-party administrators
- Attorneys
- Accountants
- Actuaries
- Investment managers
- Benefit design consultants
- Coalition leadership

PRECONFERENCE PROGRAMS

- Administrators Masters Program (AMP[®])
- Trustees Masters Program (TMP)
- TMP Advanced Leadership Summit
- Certificate of Achievement in Public Plan Policy (CAPPP[®])
- New Trustees Institute
- Enrichment Workshops

QUICK LINKS

- Conference Schedule
- Session Selection
- Continuing Education Credit
- Travel Planning
- Exhibit, Sponsorship and Advertising Opportunities
- Testimonials
- Hold Your Meeting or Event at the Annual Conference

VIDEO HIGHLIGHTS

What Your Peers Are Saying

Hear their thoughts on why they attend Annual Conference and belong to the International Foundation community.



Why young trustees attend the Annual Conference.

Why experienced trustees



attend the Annual Conference.

More of what your peers are saying.

Registration Information

	Member	Nonmember	
Through 8/31/2014	\$1,315.00		Register Online
After 8/31/2014	\$1,515.00		Register Fax/Mail

Search this site



Federal Tax ID: 39-1034021

Bill to:

Rosanne Torre 15545068
Retiree Health Care Trust Fund Board
1 Carlton B Goodlett Pl., Ste 488
City Hall
San Francisco, CA 94102-4603
US

Balance due upon receipt.

Invoice #: INV-300835-M3R9T6		Invoice Date: 8/20/2014				
Sold To: Leo Levenson 15598289		P.O. #:				
Product	Activity Code & Description	Qty	Rate	Discnt	Tax	Amount
PT-1401	Participant - Levenson, Leo	1	\$0.00	\$0.00	\$0.00	
1401-1401	60th Annual Employee Benefits Conference - Levenson, Leo <i>Dates: 10/12/14-10/15/14 Location: Boston Convention & Exhibition Center</i>	1	\$1,315.00		\$0.00	\$1,315.00
NOH	Hotel Reservation Not Booked thru International Foundation				\$0.00	
CKIFUS	Check/Cash Payment IF US	1	\$0.00		\$0.00	\$1,315.00
	8/20/2014 60043983 Retiree HC Trust 36					
Total:						\$0.00

Sub Total: \$1,315.00
Shipping: \$0.00
Payments: \$1,315.00
US\$ Balance: \$0.00

Please make checks payable to: International Foundation



www.ifebp.org



Fax: (262) 364-1818



Phone: (262) 786-6700

Please keep top portion for your records. Please cut along dotted line and remit lower portion to address noted.

Invoice #: INV-300835-M3R9T6

Invoice Date: 8/20/2014

Bill To ID: 15545068

Payment Due Upon Receipt: \$0.00

Amount Enclosed:

Check #: _____

Credit Card:

MC

VISA

DISCOVER

AX

Credit Card #: _____

Rosanne Torre
Retiree Health Care Trust Fund Board
1 Carlton B Goodlett Pl., Ste 488
City Hall
San Francisco, CA 94102-4603

Cardholder: _____

Exp: _____

Remit Payment to:

IFEBP Registrations
PO Box 689954
Chicago, IL 60695-9954

Conference registration: \$1,315

Hotel: \$1,085

Airfare: \$464 round trip

To and from airports: \$200

Per Diem (GSA rate \$71/day * 4) = \$284. Minus \$36 for 2 lunches provided by conference on Mon/Tue = \$248.

Revised Total = \$3,304.

