2010 Trustees and Administrators Institutes

New Trustees Institute | Advanced Trustees Institute | Administrators Institute

February 15-17, 2010
Disney's Contemporary Resort
Lake Buena Vista (Orlando), Florida

June 14-16, 2010
Hilton San Diego Bayfront
San Diego, California

Preconference Workshops
February 14, 2010
June 13, 2010

www.**ifebp.org**/trusteesadministrators

International Foundation
EDUCATION – BENEFITS • COMPENSATION

Trustees and Administrators Institutes

February 15-17, 2010 | Disney's Contemporary Resort | Lake Buena Vista (Orlando), Florida
June 14-16, 2010 | Hilton San Diego Bayfront | San Diego, California

The Trustees and Administrators Institutes, offered twice a year, present three side-by-side institutes—New Trustees, Advanced Trustees and Administrators. The focused tracks help those in attendance get the education and updated information they need at the level that fits their experience and role. In addition, the opportunity to exchange ideas with peers is enhanced by bringing those of similar experience together.

New Trustees Institute

Designed for multiemployer trustees who have served for less than two years, or who have not previously attended an International Foundation educational program

Advanced Trustees Institute

Designed for the experienced multiemployer trustee—Previous attendance at the New Trustees Institute is strongly recommended.

Administrators Institute

Designed for salaried and contract administrators with varying levels of experience who serve multiemployer funds

Benefits of Attending

- Pertinent information presented for your specific role
- Content developed by active trustees, administrators and professional advisors, assuring that sessions are relevant
- Objective, unbiased information
- Validated attendance tracking system to confirm your participation

Topic Overview

- Economic update
- Latest information on health care reform
- Pension Protection Act
- Investment valuation policies and due diligence
- Forms 5500/990—trustee liability revealed
- Risk tolerance—managing risk

Accompanying Educational Events

Benefit Plan Professionals Institute for Accountants (June only)

Register online today at www.ifebp.org/trusteesadministrators.

In today's ever-changing world of economic turmoil, pending legislation and subsequent new requirements affecting benefits, "advanced" trustees may feel like "new" trustees and even experienced administrators need answers. The Trustees and Administrators Institutes is a longstanding educational event that has been the cornerstone of education for new and advanced trustees and administrators of multiemployer trust funds for more than 40 years. The International Foundation's time-honored tradition of quality, relevance and objectivity continues with the 2010 program where session topics are developed by active trustees, administrators and professional advisors. Plan now to join your peers for an invaluable educational experience at this year's Trustees and Administrators Institutes.

The International Foundation Difference

The International Foundation is a nonprofit organization whose sole purpose is to educate and inform those serving the employee benefits industry. That means never accepting presenters based on sponsorship spending. That means constant evaluation of speakers to ensure that the information delivered is objective, balanced and unbiased. And it means serious self-regulation to ensure that everything we do is in line with our mission and your needs. Make the best choice. Choose the source whose sole mission is objective education. Choose the programs where you'll find that your peers greatly outnumber the vendors. Make the International Foundation your premier educator.

Our Mission

The International Foundation of Employee Benefit Plans is a nonprofit organization dedicated to being a leading objective and independent global source of employee benefits, compensation and financial literacy education and information.

Membership

Become a member and find out why 34,000 industry professionals rely on the International Foundation to stay informed and educated. In addition to discounts on all educational programs, membership ensures that you have the latest and most comprehensive information on health, pension and compensation issues as well as an instant connection to the largest peer group in the industry. You'll stand out as the one with the answers—today and well into the future. That's smart by association.

Learn more about all the benefits of membership today—Visit www.ifebp.org/memberkit.

Preconference Workshops—Sunday

February 14, 2010 | Disney's Contemporary Resort | Lake Buena Vista (Orlando), Florida
June 13, 2010 | Hilton San Diego Bayfront | San Diego, California
8:00 a.m.-1:00 p.m.

Collective Wisdom: The Path to Better Group Decision Making

Many times trustees encounter dilemmas when faced with making decisions both as individuals and as a group. Because most trustees are participants in the plan as well as guardians of that same plan, they often find themselves as both the decision makers and also those who are affected by the decisions that are made.

This could lead to ethical conflicts for trustees as their personal wishes may or may not be in alignment with the best interests of the plan as a whole. What is best for the fund may or may not be what is best for the individual trustee. In addition to this potential polarized view of the fund activities, trustees are also faced with the differences that can exist between management interests and union interests. What can a trustee do in these circumstances? What is the best way to decide what to do?

This workshop will examine the conflicts inherent in group decision making because of differing roles (participants and trustees) and constituencies (management and labor). We will explore different decision-making models. The selection of appropriate decision-making methods and the wise use of consensus will help trustees select the right tools for the task at hand. Walking the ethical path among all the options is the goal.

Key Topics

- Why decision making is hard
- What choices you have in making choices
- How to select the best decision-making model for the problem
- How to resolve the built-in conflict in your roles as individual and trustee, management and labor
- How the use of standards can assist in decision making
- Why consensus is harder than it looks
- How to examine the relationship between the decision model and the level of compliance needed for the decision
- When and how to use interest-based problem solving for decisions

Moira J. Kelly, "The Dispute Doctor"™, is president of KELLY CONSULTING LLC, a firm that concentrates in consulting and training on dispute resolution, labor relations and organizational effectiveness. She has extensive experience in resolving organizational and dispute resolution problems within unionized and nonunionized firms. Ms. Kelly is also a highly regarded trainer and speaker on a variety of organizational development and conflict management issues for all levels of audiences.

Ms. Kelly is an adjunct assistant professor of law at Marquette University Law School and an adjunct associate professor of dispute resolution in Marquette's Graduate Programs in Dispute Resolution. She co-authored the sections on grievance mediation and workplace conflict for *Alternative Dispute Resolution*. Her book, *How To Cost A Labor Contract,* is scheduled to be published by the Bureau of National Affairs (BNA) in the summer of 2010.

New Trustees Institute

Designed for multiemployer 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 ideal for collective bargaining and other personnel who work with trustees and who would like a better understanding of their role and responsibilities.

The New Trustees Institute is also offered each year as a preconference to the Annual Employee Benefits Conference. For 2010, the institute will be held November 13-14 at the Hawaii Convention Center in Honolulu, Hawaii.

SUNDAY, FEBRUARY 14 • SUNDAY, JUNE 13

12:00 noon-6:00 p.m.

Institutes Registration

MONDAY, FEBRUARY 15 • MONDAY, JUNE 14

6:30-7:30 a.m.

Continental Breakfast

7:30-8:30 a.m.

Economic Forecast

Joint session with Advanced Trustees and Administrators

At the time this brochure is being produced, the economy is showing hopeful signs of recovery; however, unemployment is expected to remain high through the first half of 2010. Understanding the economic landscape can help you make more profitable decisions for your plan.

- Overview of the current state of the economy
- Analysis of the federal government's various economic stimulus measures
  —American Recovery and Reinvestment Act of 2009
- Withstanding economic challenges
  —Lessons learned from the financial crisis that fed the recession
  —What steps can be taken to ensure the safety of your plans?
- Economic outlook for 2010 and beyond

8:45 a.m.-12:00 noon

Trustee Responsibility

- History of benefits/legislation
- Governing documents
- Major laws affecting joint trusts
- Fiduciary responsibilities under ERISA
- Basic responsibilities for operation of fund
- Allocating or delegating responsibilities

12:00 noon-1:15 p.m.

Lunch (on your own)

MONDAY, FEBRUARY 15 • MONDAY, JUNE 14 (cont.)

1:15-3:15 p.m.

Overview of Health and Welfare Funds

- Purpose and objectives
- Governing documents
- Plan design alternatives
- Funding methods/types of administration
- Reserve objective and analysis
- Income and expenses
- Communication needs and requirements

3:30-4:30 p.m.

Health and Welfare—Current Environment

- Key factors contributing to rising health care costs
- Retiree medical benefits
- Description of cost-containment programs available
- Collecting/analyzing data
- Legislative developments
  —What's being considered on the state/federal levels?

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15

6:30-7:30 a.m.

Continental Breakfast

7:30-9:15 a.m.

Overview of Pension Funds

- Purpose and objectives
- Plan of benefits
  —Requirements and limits
- Funding requirements
  —Definition of *funding*
  —Understanding the actuarial evaluation
  —Actuarial assumptions

9:30-11:15 a.m.

Pension—Current Environment

- IRS implications for overfunding vs. employer withdrawal liability
- Overview of defined contribution plans
  —Requirements/design/funding
- Transfer of pension assets to an ailing welfare fund

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

Lunch (on your own)

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15 (cont.)

12:30-3:30 p.m.
Investing Health and Welfare and Pension Assets

- Trustee responsibility for investments
- Management of risks
- Characteristics of investments
- Steps to investment policy
  —Setting investment objectives
  —Selecting the manager
  —Monitoring performance
- Impact of inflation on securities values

WEDNESDAY, FEBRUARY 17 • WEDNESDAY, JUNE 16

6:30-7:30 a.m.
Continental Breakfast

7:30-9:15 a.m.
Understanding the Fund's Financial Statements

- What is the relationship between the financial statement and fiduciary duties?
- What do the statements contain?
- What does the information tell you? What should you look for?
- What is the relationship among the financial statement, the year-end audit and government filings?

9:30-11:30 a.m.
Trust Fund Administration

- Types of administration
- Records and documents maintained by administrators
- Overview of duties and responsibilities
  —Collecting and recording contributions
  —Maintaining financial/employee records
- Communication needs and requirements
- Processing health care claims/pension applications and related functions
- Role of other professional advisors
  —Interaction with one another and with trustees

Advanced Trustees Institute

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- Withstanding economic challenges
  —Lessons learned from the financial crisis that fed the recession
  —What steps can be taken to ensure the safety of your plans?
- Economic outlook for 2010 and beyond

8:45-10:00 a.m.

The Latest on Health Care Reform

Joint session with Administrators

In late summer and into the fall of 2009, lawmakers were largely focused on health care reform. Learn about the outcome of the various bills introduced to Congress and the implications for your plans.

- Access for the uninsured/underinsured
  —Universal health care
  —Any changes for Medicare/Medicaid?
  —Other plan design options
- Funding health care reform initiatives
  —Shared responsibility: individuals/businesses/government
- Time line for implementing new legislation

10:15-11:30 a.m. Concurrent Sessions

Legislative/Regulatory Developments in the Pension Arena

Joint session with Administrators

Overview of recently passed and proposed legislation and regulations affecting pension benefit plans

- Pension Protection Act Update
  —Worker, Retiree, and Employer Recovery Act (WRERA) of 2008
    - Extension of funding improvement/rehabilitation plans
    - Freezing noncritical/nonendangered zone status
      —Relevant arbitration decisions
    - Reversing a freeze decision
  —Reporting and disclosure
    - Section 101(k) required documents
- Heroes Earnings Assistance and Relief Tax (HEART) Act of 2008
- DOL-proposed regulations on participant-directed account disclosures
  —Plan- and investment-related information
- New laws on the horizon

Understanding the Complexities of Information Provided by Your Plan Advisors

Joint session with Administrators

Know the questions you need to ask to ensure your understanding. A panel of advisors will discuss the importance of their respective communication pieces and reports, and the implications for trustees and participants.

- SAS 115 and SAS 112
- Forms 5500 and 990
- FAS 157—Fair Value Measurement
- Zone Certification Letters
- Funding improvement and rehabilitation plans

11:30 a.m.-1:00 p.m.

Lunch (on your own)

1:00-2:15 p.m. Concurrent Sessions

Pension Protection Act Update—Followup Workshop

Joint session with Administrators

Followup workshop to earlier session on Legislative/Regulatory Developments in the Pension Arena

Health Care Regulatory Landscape

- Working through the details of health care reform
- Impact of recent legislation on:
  —COBRA
  —HIPAA
  —Children's Health Insurance Program (CHIP)
  —Medicare secondary payer requirements
  —Other health care-related legislation
    - Mental health parity rules
    - Genetic Information Nondiscrimination Act (GINA)

MONDAY, FEBRUARY 15 • MONDAY, JUNE 14 (cont.)

2:30-3:45 p.m.

Concurrent Sessions

Employer Withdrawal Liability

Joint session with Administrators

- Issues for both labor and management
- Assessing the liability and understanding the rules
- Errors and pitfalls that could lead to arbitration
- Impact of mass withdrawal
  —Managed mass withdrawal

Health Care Accountability at a Personal Level

Joint session with Administrators

- Overview of various wellness program elements
  —Smoking cessation
  —Diet and exercise programs
  —Health risk assessments
- Creating awareness in your participants
  —Changing attitudes and behaviors
- Strategies for measuring success
  —Direct health care costs
  —Productivity costs
  —Disease management

Alpha, Beta, etc. . . . It's All Greek to Me

This session will provide an overview of frequently used (and frequently misunderstood) investment terms. Learn how to work through the maze of complicated investment terms to ensure good decision making for your plan's investments.

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15

6:30-7:30 a.m.

Continental Breakfast

7:30-8:30 a.m.

Legal/Fiduciary Update

Summary of recent and relevant case law, including interpretation and application of fiduciary oversight and decisions in areas such as health care, retirement benefits and investment management.

8:45-10:00 a.m. Concurrent Sessions

Trustee Expenses Revisited

- Department of Labor position on trustee expenses related to meetings and/or educational conferences
  —"Reasonable" expenses
  —Required documentation
  —Prohibited transactions and exemptions
  —Trustee gifts/entertainment
- LM-10/LM-30 update
- Reviewing your plan's expense reimbursement and education policies

Health Care Accountability at a Personal Level—Followup Workshop

10:15-11:30 a.m. Concurrent Sessions

A Trustee's Two-Hat Dilemma

Most would agree that the potential for conflict between the union and/or employer association and the interests of the participants is unavoidable. And today's economic climate most likely contributes to the frequency that trustees need to face this two-hat dilemma. Hear from a panel of experts who will address:

- Common two-hat dilemmas
  —Contribution issues
  —Collection issues
  —Investment decisions
  —Inappropriate actions of fellow trustees
- Trustees on related funds
- Advice from the professionals

The Many Faces of Risk

Risk management is more important than ever. Understanding risk management can give trustees some idea of where potential problems lie. Proper safeguards can then be put into place that can help ensure the safety of future benefits.

- Revisiting the basic principles of investing and risk management
  —Types of risk
  —Measuring risk
- Can your asset allocation prevail?
  —Liability-driven investments: Viable option for asset allocation?
- Back to targets—implementing a rebalancing strategy

11:30 a.m.-1:00 p.m.

Lunch (on your own)

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15 (cont.)

1:00-2:15 p.m. Concurrent Sessions

Selecting and Monitoring Your Plan Professionals

- Developing a process for selecting plan advisors
  —Defining and communicating your expectations
  —Establishing guidelines and reporting procedures
- Methods for evaluating quality and performance
  —Setting performance goals
  —Benchmarking resources
- Terminating an advisor relationship

Valuation Policies for Alternative Investments

Trustees have a responsibility for understanding how their plan investments are valued. This requirement for due diligence and other issues are discussed, including

- FAS 157 considerations
- Contracts with fund managers
- Outlook for the regulation of hedge funds
- Rules for foreign bank accounts (FBAR)
- Redemption issues.

2:30-3:45 p.m. Concurrent Sessions

The World of Specialty Drugs

Joint session with Administrators

- Specialty guideline management
- Step therapy
- Plan design for wave of the future
- Managing participants and utilization

Filing Forms: You Want Me to Sign What?

- What are the legal ramifications and requirements involving trustee signatures?
- How much due diligence does your signature deserve?
- Understanding the
  —Form 5500
  —Form 990
  —Representation letter
- Best practices in preparing documents for signature

Withdrawal Liability—Followup Workshop

Followup workshop to earlier session on Withdrawal Liability. After withdrawal liability, what's next?

WEDNESDAY, FEBRUARY 17 • WEDNESDAY, JUNE 16

6:30-7:30 a.m.

Continental Breakfast

7:30-8:45 a.m.

The Future of Retirement

Joint session with Administrators

- Role of Social Security and Medicare
- Employer-sponsored retirement plans
  —Traditional defined benefit plans
  —Defined contribution plans
- Saving for retirement
  —Effect of economic crisis of 2008 on savings habits of workers and retirees
- Options for supplementing retirement income

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

Health Care Fraud: What Trustees and Administrators Need to Know

Joint session with Administrators

- What constitutes fraud and where is it found?
- Who is typically involved in fraud?
- Preventive measures
  —Proper coordination of benefits
- Subrogation issues

9:00-10:15 a.m. Concurrent Sessions (cont.)

Defined Contribution Plans: Another Source of Retirement Security

- Characteristics of multiemployer defined contribution (DC) plans
  —Dual plans with defined benefit (DB) plans
  —Growth of profit-sharing plans
  —Trustee-directed and participant-directed investments
  —Loans and hardship withdrawals
  —Options for payment
- Status of disclosure requirements
- Assessing service provider relationships and fees

10:30-11:45 a.m. Concurrent Roundtable Discussions

The Future of Retirement

Followup to earlier session

The World of Specialty Drugs

Followup to earlier session

Defined Contribution Plans

Followup to earlier session

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  —Reporting and disclosure
    - Section 101(k) required documents
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  —Plan-related and investment-related information
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Understanding the Complexities of Information Provided by Your Plan Advisors

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- SAS 115 and SAS 112
- Forms 5500 and 990
- FAS 157—fair value measurement
- Zone Certification Letters
- Funding improvement and rehabilitation plans

11:30 a.m.-1:00 p.m.

Lunch (on your own)

1:00-2:15 p.m. Concurrent Sessions

Pension Protection Act Update—Followup Workshop

Joint session with Advanced Trustees

Followup workshop to earlier session on Pension Legislative/Regulatory Developments in the Pension Arena

Trends in Electronic Communication—Workshop

- Overview of the electronic communication technology landscape
- Can a Web site presence provide better service?
  —Relevant content, easier access, greater convenience
- What about social networking?
- Developing a strategic plan for implementing new technology
  —Know your users
  —Goals and time lines
  —Securing the necessary management buy-in
- Other electronic communication opportunities

MONDAY, FEBRUARY 15 • MONDAY, JUNE 14 (cont.)

2:30-3:45 p.m. Concurrent Sessions

Employer Withdrawal Liability

Joint session with Advanced Trustees

- Issues for both labor and management
- Assessing the liability and understanding the rules
- Errors and pitfalls that could lead to arbitration
- Impact of mass withdrawal
  —Managed mass withdrawal

Health Care Accountability at a Personal Level

Joint session with Advanced Trustees

- Overview of various wellness program elements
  —Smoking cessation
  —Diet and exercise programs
  —Health risk assessments
- Creating awareness in your participants
  —Changing attitudes and behaviors
- Strategies for measuring success
  —Direct health care costs
  —Productivity costs
  —Disease management

PPA Certified Red—Now What? A Case Study

- Bringing your plan's benefits and resources into balance
  —Adopting a rehab plan
  —What to do if bargaining parties do not agree
  —Multiple rehab plans
- Implementing the rehab plan
  —Required communication notices
    - Notices to bargaining parties
    - Notices to participants and beneficiaries

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15

6:30-7:30 a.m.

Continental Breakfast

7:30-8:30 a.m.

Legal/Regulatory Update

Overview and discussion of recent legislative/regulatory initiatives, compliance procedures and their impact on administration

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15 (cont.)

8:45-10:00 a.m. Concurrent Sessions

Reporting and Disclosure Update

- Refresher on requirements
  —New requirements introduced by the Pension Protection Act (PPA)
  —Department of Labor (DOL)
  —Internal Revenue Service (IRS)
  —Joint DOL/IRS
  —Pension Benefit Guaranty Corporation (PBGC)
  —Department of Health and Human Services (HHS)
- Handling participant requests
  —How must the request be made?
  —What format must be used for responses?

Administrator's Role in Withdrawal Liability

- Defining withdrawal liability
- Identifying potential and partial withdrawals
- Developing a withdrawal liability procedure
- Employer disclosure requirements
  —Timing
- Roles of plan professionals

10:15-11:30 a.m. Concurrent Sessions

Reporting and Disclosure—Followup Workshop

Followup workshop to earlier session on Reporting and Disclosure Update

Understanding Actuarial Calculations

The role of the actuary is to provide the plan sponsor with the guidance needed to make informed decisions about the benefit programs for which they are responsible. Understanding the actuarial calculations is critical to the administration of these plans. This session will review:

- Annual actuarial report
- Actuary's role in preparation of Form 5500 and related schedules
- Pension Protection Act
  —Pension plan zone certification
- Why are liabilities measured differently (auditors, IRS, actuaries, etc.)?
- Overview of assumptions
  —How they are determined.

11:30 a.m.-1:00 p.m.

Lunch (on your own)

TUESDAY, FEBRUARY 16 • TUESDAY, JUNE 15 (cont.)

1:00-2:15 p.m. Concurrent Sessions

DOL/IRS Audits

- The role of the administrator before, during and following an investigation
  —What part does the plan attorney play?
- The focus and decisions made by agency investigators
- Ongoing policies and procedures for preparing and responding to investigation auditors
- Required communication following the audit
- Typical areas reviewed for all plans
  —Areas of review for pension plans
  —Areas of review for health and welfare plans
- Advantages of self-audits

Planning for a More Effective Board of Trustee Meeting

- Dual goals of effectiveness and efficiency—before, during and after the meeting
- Agenda preparation and review
  —Identification of new and pending issues
- Information gathering
  —Relevant and up-to-date reports from fund advisors and board committees
- Establish time lines for knowing what to focus on and when
- Preparation and distribution of meeting minutes
- Coordinating a followup task list

2:30-3:45 p.m. Concurrent Sessions

The World of Specialty Drugs

Joint session with Advanced Trustees

- Specialty guideline management
- Step therapy
- Plan design for wave of the future
- Managing participants and utilization

Successful Staff Training Programs: Planning Is Essential

- Analyzing your organization, tasks and staff
  —Identifying what has to be learned and/or changed
- Assessing the readiness and motivation of your staff
  —Steps you can take to introduce a training program
- Deciding where the training will take place
  —On the job/off the job/other learning situations
- Evaluating the success of your program
  —Feedback from participants
  —Learning validation (tests)
  —Knowledge application (on the job)

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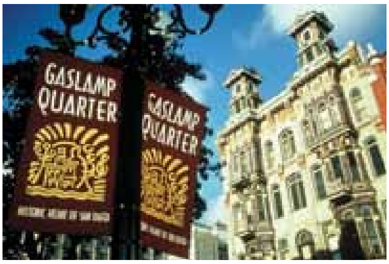
- What constitutes fraud and where is it found?
- Who is typically involved in fraud?
- Preventive measures
  —Proper coordination of benefits
- Subrogation issues

Record Retention
- The need for periodic review of record retention policies
- ERISA record retention provisions
- Record retention requirements for health and welfare plans
- Consequences of failure to maintain proper records
  —Importance of records in potential future litigation

10:30-11:45 a.m.
Open Forum
Time set aside for attendees to pose remaining questions and share ideas and experiences with others

Can't Fit the February Trustees and Administrators Institutes Into Your Schedule?



Trustees and Administrators Institutes
June 14-16, 2010
Hilton San Diego Bayfront
San Diego, California

Mark your calendar for June!

Benefit Plan Professionals Institute for Accountants will run concurrently with the June program of the Trustees and Administrators Institutes.

EXHIBITS—JUNE INSTITUTES

Service Providers: Interested in Exhibiting or Supporting Through Sponsorship?

The exhibit hall at the June Trustees and Administrators Institutes presents a unique and valuable opportunity for exhibitors:

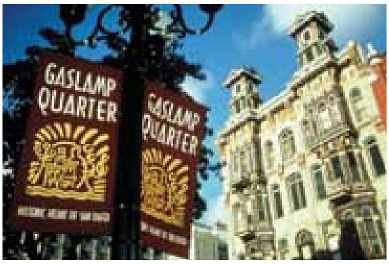
- Reach a concentrated audience of 600 attendees (projected).
- Over 75% of attendees at the June institutes do not traditionally attend the Annual Conference—Exhibiting will give you exposure to a new group of attendees.
- A maximum of 40 exhibiting companies representing a cross section of products and services will be featured. Space will be allocated evenly among types of exhibiting companies.

Sponsorship opportunities are available at both the February and June institutes.
For information, please contact Cheryl Hyslop at (262) 373-7657 or cherylh@ifebp.org

New Trustees Institute
November 13-14, 2010
Hawaii Convention Center
Honolulu, Hawaii

New Trustees Institute is also offered each year as a preconference to the Annual Employee Benefits Conference.

Held in Conjunction With the June Trustees and Administrators Institutes!



Benefit Plan Professionals Institute for Accountants

www.ifebp.org/professionals
June 14-16, 2010
Hilton San Diego Bayfront
San Diego, California

This institute is designed for accountants who serve multiemployer and public employee benefit plans. Sessions provide information for both the new benefits practitioner and the more seasoned benefits professional.

Benefits of Attending

- An informative and up-to-date program agenda with some sessions providing a broad perspective of the latest information on health and pension benefit issues and others providing a more detailed perspective
- Opportunity to earn meaningful continuing professional education (CPE) credits
- This program, held in conjunction with the Trustees and Administrators Institutes in both locations, presents the opportunity to network with current and/or potential clients.

Additional 2010 Educational Programs

	Date	Program
Winter	January 11-13	Trustees Institute for Jointly Managed Training and Education Funds Las Vegas, Nevada www.ifebp.org/trusteesinstitute
Winter	March 22-24	Health Care Management Conference New Orleans, Louisiana www.ifebp.org/healthcare
Spring	April 19-20	Investments Institute Phoenix, Arizona www.ifebp.org/investments
Spring	May 3-4	Washington Legislative Update Washington, D.C. www.ifebp.org/washington
Spring	May 24-27	Portfolio Concepts and Management Philadelphia, Pennsylvania www.ifebp.org/wharton
Summer	June 7-11	Essentials of Multiemployer Trust Fund Administration Brookfield, Wisconsin www.ifebp.org/essentialsme
Summer	June 14-16	Trustees and Administrators Institutes and Benefit Plan Professionals Institute for Accountants San Diego, California www.ifebp.org/trusteesadministrators
Summer	July 19-21	Hedge Funds, Real Estate and Other Alternative Investments San Francisco, California www.ifebp.org/wharton
Summer	August 2-3	Benefit Communication and Technology Clinic Boston, Massachusetts www.ifebp.org/benefitcommunication
Fall	September 27-28	Collection Procedures Institute Las Vegas, Nevada www.ifebp.org/collections
Fall	**November 14-17**	**56th Annual Employee Benefits Conference** **Honolulu, Hawaii** www.ifebp.org/usannual
Fall	November 13-14	Administrators Masters Program (AMP®) Honolulu, Hawaii www.ifebp.org/amp
Fall	November 13-14	Trustees Masters Program® (TMP®) Honolulu, Hawaii www.ifebp.org/tmp
Fall	November 14	TMP® Advanced Leadership Summit Honolulu, Hawaii www.ifebp.org/tmpsummit

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 45 days prior to the program taking place.

For further information on continuing education credit, please call (262) 786-6710, option 2.

POLICIES

- See our policies regarding your registration/cancellation/refund/record retention and privacy at www.ifebp.org/policies.
- Cancellation/transfer requests must be in writing, and are subject to a fee of $50 per meeting day for cancellations and $50 for transfers.
- Cancellation fee is TRIPLED for registrations canceled within 30 days of meeting.
- Cancellations received on or after the opening day of a program are subject to forfeiture of all registration fees.
- For more information regarding administrative policies such as complaint and refund, please contact Registrations at (262) 786-6710, option 2, or edreg@ifebp.org.

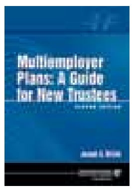
CAR RENTAL DISCOUNT

AVIS® has been appointed as the official car rental agency for International Foundation educational programs. For reservations, please call the AVIS reservation number at (800) 331-1600, 24 hours a day, seven days a week. Reservations can also be made online at www.avis.com. Refer to AVIS Worldwide Discount (AWD) Number A325599.

RELATED READING

Multiemployer Plans: A Guide for New Trustees
Second edition

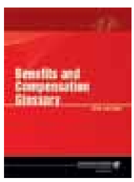
Joseph A. Brislin



Every new trustee should have a copy of this book! As an attorney and trustee to several multiemployer funds, the author provides an overview of multiemployer plans and explains the important role trustees play in plan management. He also reviews the fiduciary duties and responsibilities assumed by a new trustee; explains many of the terms, laws and documents that a trustee is expected to understand; and offers invaluable practical advice. (International Foundation)

- **123 pages. 2010. Item #6733. $49 (I.F. Members $39) includes shipping and handling. Available in both print and e-book formats.**

Benefits and Compensation Glossary
12th Edition



Easy-to-understand definitions for more than 2,500 terms used by employee benefits professionals in the United States and Canada. A list of abbreviations and acronyms is also provided. (International Foundation)

- **206 pages. 2010. Item #6634. $69 (I.F. Members $54) includes shipping and handling. Available in both print and e-book formats. Quantity discounts available.**

REGISTRATION/2010 Trustees and Administrators Institutes

CUSTOMER INFORMATION (Please print clearly)

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REGISTRATION INFORMATION

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Special assistance? ☐ Yes ☐ No

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Trustees and Administrators Institutes (#02-1002)

February 15-17, 2010 • Lake Buena Vista (Orlando), Florida

Check (✔) session track attending: ☐ New trustee ☐ Advanced trustee ☐ Administrator

	Until January 4	After January 4
Member fee	☐ $1,020	☐ $1,170
Nonmember fee	☐ $1,215	☐ $1,365
Sunday preconference member fee	☐ $ 340	☐ $ 390
Sunday preconference nonmember fee	☐ $ 405	☐ $ 455

Trustees and Administrators Institutes (#09-1009)

June 14-16, 2010 • San Diego, California

Check(✔) session track attending: ☐ New trustee ☐ Advanced trustee ☐ Administrator ☐ Accountant (#09-10G1)

	Until May 3	After May 3
Member fee	☐ $1,020	☐ $1,170
Nonmember fee	☐ $1,215	☐ $1,365
Sunday preconference member fee	☐ $ 340	☐ $ 390
Sunday preconference nonmember fee	☐ $ 405	☐ $ 455

2010 POLICY: Cancel fee ($50 /meeting day) is **TRIPLED** ($150/meeting day) if registration is canceled within 30 days of meeting.

HOTEL

☐ **February:** *Disney's Contemporary* Resort ☐ $249 single/double.
Reservation deadline is **January 15, 2010.** (Include $350 hotel deposit)

SMOKE-FREE PROPERTY

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Reservation deadline is **May 11, 2010.** (Include $350 hotel deposit)

Smoke free? ☐ **Yes** ☐ **No**

# of Adults ________ # of Children ________ ☐ King bed ☐ Two beds

Arrival date ___________ Departure date _______________

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RELATED READING

☐ **Multiemployer Plans: A Guide for New Trustees, Second Edition** Item #6733 $49 (I.F. Members $39)

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