

Meeting Date  
**10/02/13**  
Agenda Item  
**#14a.**

# 59<sup>th</sup> Annual Employee Benefits Conference

October 20-23, 2013 | Las Vegas, Nevada  
Preconference Dates: October 19-20, 2013

## Complete Program Agenda

**STAY IN FRONT**  
OF THE MOST CRITICAL BENEFIT ISSUES

Latest Information  
on the Affordable  
Care Act (ACA)

Economy and  
Globalization  
of Investments

Pension  
Funding and  
Current Trends

Legislative  
and Regulatory  
Compliance



# 59<sup>th</sup> Annual Employee Benefits Conference

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## Why You Should Attend

As a trustee or plan fiduciary, you have an obligation to keep current with education. You bear an incredible responsibility for making sound judgments for your plan members. To do that, you need solid, straightforward information. Count on the Annual Conference to respond directly to the serious financial challenges facing pension and benefit trust funds.

## The Community

Benefits beyond education—With nearly 5,000 individuals in attendance each year, the Annual Conference is an unmatched opportunity for networking. You'll have the opportunity to learn alongside colleagues who share a sense of common purpose, including

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

## Your Registration Includes

- Welcome reception on Sunday, October 20
- Access to over 125 educational sessions
- Comprehensive take-home materials, resources and references
- All handouts provided electronically
- Extensive networking opportunities with nearly 5,000 other attendees
- Morning refreshment breaks
- Lunch (in the exhibit hall on Monday and Tuesday)
- Access to over 200 providers in the exhibit hall
- Insights from over 300 different speakers
- Open forum sessions for getting answers straight from the experts.

## Your International Foundation

We are the face of our members—over 35,000 people who represent over 8,300 trust funds, corporations and other organizations. People like you. We are 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 content and speakers to assure that the information delivered is objective, balanced and unbiased. And it means serious self-regulation to ensure everything we do is in line with our mission and your needs.

We are the International Foundation of Employee Benefit Plans. We are your association.

## 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.





# Main Conference Overview

The Annual Conference provides an ideal setting for discovering and learning new approaches to the current challenges you face. At the same time, this conference offers an abundance of opportunities for you to collaborate with peers who are dealing with many of the same issues.

Featuring over 100 sessions, workshops and roundtables covering an extensive variety of benefits topics, the Annual Conference offers education that is the key to survival for benefit plan fiduciaries.

**All conference functions are held at the Mandalay Bay Las Vegas. Registration is located in the Mandalay Bay Foyer.**

## Friday, October 18

**Registration Desk Hours** ..... 12:00 noon-5:00 p.m.

## Saturday, October 19

**Registration Desk Hours** ..... 6:30 a.m.-5:00 p.m.

Technology Labs\* (FREE) ..... 10:00 a.m.-3:45 p.m.

Preconference Options ..... See details on pages 12-26

## Sunday, October 20

**Registration Desk Hours** ..... 6:30 a.m.-5:00 p.m.

Technology Labs\* (FREE) ..... 10:00 a.m.-3:45 p.m.

Preconference Options ..... See details on pages 12-26

*Guests are welcome to the following Sunday events:*

Exhibit Hall Grand Opening ..... 12:00 noon

Exhibit Hall Hours ..... 12:00 noon-4:30 p.m.

**Opening Keynote Session** ..... 4:30-6:00 p.m.

*(Qualifies toward attendance certificate)*

Welcome Reception (in Exhibit Hall) ..... 6:00-7:00 p.m.

## Monday, October 21

**Registration Desk Hours** ..... 6:30 a.m.-4:30 p.m.

Sessions ..... 7:30 a.m.-4:15 p.m.

Exhibit Hall Hours ..... 10:30 a.m.-2:30 p.m.

**Lunch** (in Exhibit Hall) ..... 11:45 a.m.-1:15 p.m.

## Tuesday, October 22

**Registration Desk Hours** ..... 6:30 a.m.-4:15 p.m.

Sessions ..... 7:30 a.m.-4:00 p.m.

Exhibit Hall Hours ..... 10:30 a.m.-2:30 p.m.

**Lunch** (in Exhibit Hall) ..... 11:45 a.m.-1:15 p.m.

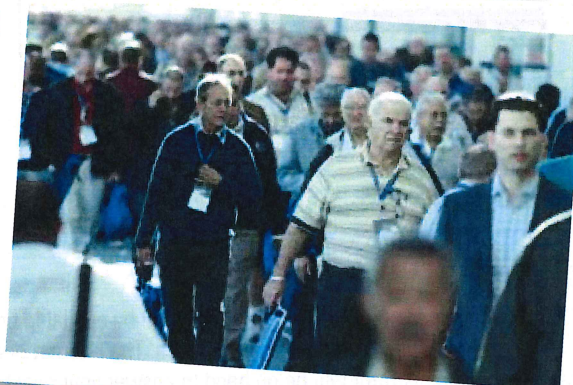
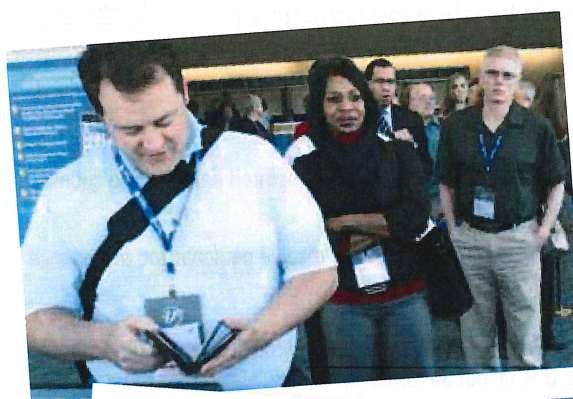
## Wednesday, October 23

**Registration Desk Hours** ..... 6:30 a.m.-12:00 noon

Sessions ..... 7:30-11:45 a.m.

*Guests are welcome to the following Wednesday event:*

**Finale Keynote Session** ..... 10:30-11:45 a.m.



## \*Technology Labs

**Step-by-step demonstrations designed for trustees who have minimal technology experience!**

Attendance is limited to provide participants with adequate access to equipment. Attendance tickets will not be accepted for the technology lab sessions.

### Saturday AND Sunday

10:00-10:45 a.m.—iPads

11:00-11:45 a.m.—Androids

1:00-1:45 p.m.—Social Media 101

2:00-2:45 p.m.—iPads

3:00-3:45 p.m.—Androids

*Sessions will be held in the Mandalay Bay Foyer.*

**Visit [www.ifebp.org/usannual](http://www.ifebp.org/usannual) for the latest conference information!**



# 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 yellow 'Continuing Education Attendance Form' with fields for Name, Title, Company, and State. It includes a section for 'Session Information' with checkboxes for 'Attended' and 'Not Attended'. At the bottom, there is a signature line and a date field. The form is branded with the International Foundation of Employee Benefit Plans logo.

## On-Site Information

CE information and personalized assistance will be available on site located 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](mailto: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](http://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 on our website at [www.ifebp.org/usannualCE](http://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/NPN/BAR/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](http://www.learningmarket.org).

NASBA topic recommendations for the Annual Conference sessions can be found on our website at [www.ifebp.org/usannualCE](http://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, the CFA Institute and the Investment Management Consultants Association (IMCA) for approval of investments credit. A list of sessions approved for CFP®, CFA and CIMA® credit will be posted on our website at [www.ifebp.org/usannualCE](http://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](mailto:continuinged@ifebp.org) for information on how the 59th Annual Employee Benefits Conference could meet continuing education requirements for other professions.

## IRS (ERPA/EA)

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](http://www.ifebp.org/usannualCE) to view credit information.



APPROVED  
CONTINUING EDUCATION  
PROVIDER

**Enrolled Actuaries**—Recommendations for CORE and NONCORE credit will be provided at [www.ifebp.org/usannualCE](http://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. No CE attendance forms are necessary to earn CEBS CPE credit. Visit [www.cebscpe.org](http://www.cebscpe.org) for more information, or contact the Foundation's CE Department at (262) 786-6710, option 2 or [continuinged@ifebp.org](mailto:continuinged@ifebp.org).