

72nd ANNUAL

Employee Benefits Conference

October 25-28, 2026

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VIRTUAL SESSIONS

International Foundation
OF EMPLOYEE BENEFIT PLANS 

SUNDAY | 4:30-6:00 p.m.



A OPENING SESSION—The Challenge of Change

Shankar Vedantam, *Hidden Brain*

The central challenge for all organizations is adaptation. How do you build a new plane while flying the old one? How do you bring your people along when the path is difficult, uncertain and risky? This talk explores the hidden psychological barriers that make organizational change difficult, then offers specific and actionable ideas (including one “ninja” technique) to bring about real change.



MONDAY | 7:30-8:45 a.m.



B KEYNOTE SESSION—The Human Advantage

Seth Mattison, *FutureSight Labs*

In this powerful and provocative program, Seth Mattison brings together his signature ideas, The Human Advantage and The Human Moat, to help leaders and teams get clear on where they create real value in a world shaped by AI.

As speed, knowledge and execution become easier to access, the edge moves somewhere else. Not in doing more, but in how you think, how you decide and how you show up when it matters.

This experience invites people to take a hard look at the way they are working and leading today, and to step into a different standard. One where agency matters, where alignment is real, and where the human elements that can't be automated become the foundation for how you lead, perform and move forward.



MONDAY | 9:15-10:15 a.m.

F01



You Are a Fiduciary—Now What?

Jennifer S. Abrams, Esq., SWB, PC

- Understanding your obligations regarding:
 - Financial oversight and benefit payments
 - Collections of contributions and withdrawal liability
 - Securing data and privacy
- Trust fund business vs. other business
- Familiarity with fund policies and procedures
- Duties/activities that can be delegated



G01



U.S. Legislative Update

James A. Klein, *American Benefits Council*

This session provides an informative and comprehensive analysis of recent, pending or upcoming legislation activities that will continue to shape your plan decisions.



H03

DOL Audit Trends for Health Plans

Rory Kane Akers, JD, *Lockton*

- DOL oversight practices
- Recent enforcement overview
- Evaluating the investigation process
- Current enforcement trends



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MONDAY | 9:15-10:15 a.m.

I01



Institutional Investing 101

Russell D. Kamp, Ryan ALM, Inc.

- Basics of stocks, bonds and interest rates
- Terms used in investments
- Separate accounts, commingled funds and mutual funds
- Cyclical nature of investments
- Historical views of portfolio design
- Why market timing doesn't work



MONDAY | 10:45-11:45 a.m.

A02

Creating a Multiemployer Fund Office Compliance Calendar

Jennifer A. De Leonardis, MBA, CEBS, Local 1102 RWDSU UFCW, Health and Pension Funds

Owen M. Rumelt, Esq., Cary Kane PLLC

With so many new reporting requirements, it has become increasingly difficult for fund offices to manage their timelines.

- What is due and when?
- What if your plan year is not the calendar year?
- Communication strategies



F02



Best Practices in Trustee Processes and Oversight

Mark E. Belland, Esq., O'Brien, Belland & Bushinsky, LLC

- Evolving fiduciary responsibilities
- Disclosures, conflicts of interest and parties in interest
- Areas vulnerable to breaches in fiduciary responsibility
- Oversight of professionals, investments and fees



G02



U.S. Regulatory Update

Mariah M. Becker, ACA, EA, MAAA, National Coordinating Committee for Multiemployer Plans

Lisa M. Gomez, LMG Collaborative Consulting Solutions LLC

Elena Lynett, JD, Segal

Michael T. Oscar, Oscar Policy Group, LLC

Join this session to hear the latest trends and hot topics in employee benefit plan regulation.



H02



Health Care Legal and Legislative Update

Shaamini A. Babu, Esq., Babu and Hallman, PC

Marcelle J. Henry, Esq., LLM, Pitta LLP

Attend this session to learn about updates in the legislative and regulatory environment for health and welfare plans.



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F04



Wearing the Right Hat at the Right Time—The Two-Hat Dilemma



Daneen Boyce, GBA, United Food and Commercial Workers (UFCW) Local 1776 Keystone State

Ruth S. Marcott, Kutak Rock LLP

Kevin J. McCaffery, CEBS, Teamsters Local 707

This session will examine real-life scenarios that demonstrate the fine line between outside interests and the interests of the participants.

- Difficult and uncomfortable decisions
- Understanding your co-fiduciary responsibility
- Tools and processes for effective decision making
- Appropriate documentation and due diligence

This session is one of two required sessions TMP candidates must attend to receive their pin.

H07



GLP-1 Drugs—Part I: Coverage Considerations



Josh Bindl, National CooperativeRx

- Industry update: Pipeline changes, impact of direct-to-consumer advertising, oral medications and more
- Balancing plan costs and outcomes
- Managing member expectations
- A view from the fund office

I05



Working With Your Investment Professionals



Susan B. Niver, Esq., Vedder

Michael Sullivan, NEPC, LLC

- Understanding investment consultants and managers and their roles
- Understanding fee arrangements and negotiations
- Ensuring that strategies align with your fund's goals
- Reading the reports from your consultant and fund managers
- Maximizing your advisory obligation while maintaining a strong relationship

P11



Challenges Facing Defined Contribution Plans



Lee Centrone, BeneSys, Inc.

Kevin Culp, EA, FSA, MAAA, Horizon Actuarial Services, LLC

- What types are out there?
- Participant vs. trustee directed
- 401(k) vs. other plan types for the multiemployer world
- SECURE 2.0 implications
- How to complement your defined benefit (DB) plan (if you have one)

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MONDAY | 2:45-3:45 p.m.

F12



Fiduciary Responsibilities in a Defined Contribution Plan



Ivelisse Berio LaBeau, Esq., National Employee Benefits Administrators, Inc.

Daniel R. Brice, Esq., Blitman & King LLP

- Timely transfer of worker contributions (wage deferrals) and employer contributions to the recordkeeper
- Choosing and monitoring investment options
- Understanding the various share classes and fees
- Participant loans and hardships
- Monitoring administrative reserves and forfeitures

G03



Updates in Benefits Litigation



Katherine A. Hesse, Esq., CEBS, Murphy, Hesse, Toomey & Lehane, LLP

Attend this session to learn about updates in litigation and fiduciary responsibility for employee benefit plans. The speaker will cover a range of new and/or updated cases within the federal court system.

H15



Health Plan Reserves—Where Should You Be?



Marcella Giorgou, FSA, EA, MAAA, Milliman, Inc.

Devin Shaver, CEBS, Milliman, Inc.

- Determining your appropriate reserve level
- Factors to consider: Funded status, population characteristics and more
- Impact of plan investment metrics
- Creating and maintaining an effective plan reserve policy

P08



Designing a Participant Education Plan



Bethany Marshall, CEBS, National Football League Players Association (NFLPA)

Breanna L. Radtke, Mid-America Carpenters Regional Council Benefit Funds

- Building a model of education
 - Goals of the retirement plan
 - Planning for the future
- Understanding distribution options
- Appropriate messages for participants, employers, trustees and administrators

TUESDAY | 7:30-8:45 a.m.



C KEYNOTE SESSION—Economic Outlook



Rana Foroohar, *Financial Times* and CNN

Markets are at record highs, yet there are many risks on the horizon, from a massive run-up in public and private debt to the specter of inflation, bond market crisis and dedollarization. How does our current political and economic moment compare to other periods of history, such as the 1920s, 1970s or 2000s? How is it different? And what's really driving the markets today? While headlines are all about politics, there are deeper economic currents that businesspeople need to understand to navigate the next decade. Foroohar lays out the key issues that leaders need to consider, from the impact of AI and technological disruption to the end of cheap capital and regionalization of trade routes, as well as the emergence of a new currency order.

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A05

Policies and Plan Documents



Kevin Cope, CEBS, NECA-IBEW Pension and Welfare Trust Funds

Marcy J. Dunlap, Esq., Cohen, Weiss and Simon LLP

Attend this session for an overview of many key policies and documents to consider for plan administration, such as:

- Education policies
- Trustee expense and reimbursement policies
- Delinquent and collection policies
- AI policies (staff, trustees, etc.)
- Document retention policies (physical and electronic)
- HIPAA and PII policies
- Plan documents, summary plan descriptions, SMMs and SBCs.

F05



Trustee Expenses



James M. Heinzman, CFE, CPA, Schultheis & Panettieri, LLP

Andrew E. Staab, U.S. Bank National Association

- Plan-related expenses vs. other expenses
- Areas of potential concern
- Documentation and policies
- How good people can make poor choices
- Training your new trustees
- Areas drawing DOL attention

G04



What Is Wellness?



Mark A. Campbell, PhD, CWP, NBC-HWC, Campbell Performance Systems/Nature of Wellness Podcast

- Mental health initiatives
- Inclusion considerations
- Financial wellness

I11



The Impact of Artificial Intelligence on Investing—Hype or Market Shift?



Mark S. Yamada, PÜR Investing Inc.

- Understand how AI is shaping markets
- Explore impacts on productivity and labor markets
- Examine market concentration and mega cap dominance
- Assess shifts in capital investment and valuations
- Identifying risks and opportunities for plans

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F06



Best Practices in Selecting Fund Professionals



Jeff Applegate, Equity-League Benefit Funds

Anthony S. Cacace, Esq., Proskauer LLP

Earl Mathurin, MS, Local 338 RWDSU/UFCW

- Performance metrics and standards (including performance penalties)
- Fees and reporting, including §408(b)(2)(B)
- RFPs and RFI
- Vendor cybersecurity best practices and questionnaire responses
- Reviewing service provider succession plans
- Understanding the trustee's fiduciary responsibility of selecting the fund professionals

G07



Rising to the Challenge: Communications in Difficult Situations



Chase Sterling, MA, CWP, Wellbeing Think Tank

Matthew Triebwasser, PHR, American Federation of Musicians & Employers' Pension Fund

- Raising difficult issues
- Conflict resolution
- Handling difficult and disputed decisions
- Creating trust through conflict

H10



Mental Health Benefits—Accessing Necessary Resources



Tramaine EL-Amin, MA, National Council for Mental Wellbeing

Andrew Johnson, Teamster Center Services Fund

- Identifying causes, symptoms, risk factors and preventive steps
- Provider landscape update
- Overview of psychedelic offerings
- Plan design considerations
- Where your plan participants can access appropriate resources

P01



Legal and Legislative Update for Retirement Plans



Steven E. Grieb, JD, CEBS Compliant, Gallagher

- New legislative and regulatory developments
- State initiatives that may affect the plan sponsor
- Defined contribution litigation

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F07



Important Tools for Monitoring Compliance



Nichelle L. Henry, BeneSys, Inc.

Paul Stoehr, CEBS, Ledbetter Partners LLC

Jason Walden, Greater Cleveland-North Central Ohio NECA

- Big data and data analytics
- What your vendors bring to the table
- Audits—Dependents, death, cyber and compliance
- Policies and procedures
- Contract language

G13



Artificial Intelligence Uses in the Fund Office



Eric Griffin, Linea Solutions Inc.

Nathan Haws, Linea Solutions Inc.

Artificial intelligence is increasingly being evaluated by benefits organizations as a tool to support benefits administration. This session focuses on how AI is being applied in practical, measured ways within benefit plans, with an emphasis on practical use cases rather than future promises.

- Operational tasks
- Governance, risk and oversight considerations
- Current capabilities, limitations and appropriate use

I15



The State of Real Estate



Brittini Lupe, American Realty Advisors

Derek Proctor, Meketa Investment Group, Inc.

- Current market review
- Understanding the market shifts and opportunities they present
- Exploring alternative property types
- Liquidity and valuation risks

P04



Actuarial Basics for the Nonactuary



Tim Connor, EA, FSA, MAAA, Milliman, Inc.

Jake Libauskas, FSA, EA, MAAA, FCA, Cheiron, Inc.

- Understanding the valuation report
- Key assumptions and how they impact valuation and costs
- How changes in benefits affect long-term costs
- Understanding zone status
- What are present values and how are they calculated?

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A07

Addressing Industry Challenges: Sharing Accounting and Auditing Best Practices in the Fund Office



Robert Blumenfeld, Trucking Employees of North Jersey/Teamsters Industrial Employees

John J. Heim, MBA, The New York Hotel Trades Council & Hotel Association of New York City, Inc.
Employee Benefit Funds

- Internal controls
- Large office vs. small office
- Responsibilities—Administrator and the auditor
- Competing priorities
- Policies and procedures

F08



Understanding and Monitoring Your Financials



Amanda Cronk, CPA, Plante Moran

Ann M. Kellen, CPA, IBEW Local 292 Fringe Benefit Plans

- How to read the plan's financial statements and tax returns
- Ratios and reserves
- Creating and following a budget for the plan/trust
- Internal financial statements vs. external
- Trustee roles and responsibilities

G08



Providing Preretirement Support to Your Members



William F. Feyling, Carpenter Funds Administrative Office of Northern California, Inc.

Chris Fielder, Segal Benz

This session will share guidance and tools for you to help your members transition into retirement.

- Retirement readiness: Financial and emotional support
- How to explain different retirement plan structures and benefit options
- Health care options
- Activities beyond the workplace

H08



GLP-1 Drugs—Part II: 2026 Data Insights



Dr. Siddhartha Angadi, PhD, FACSM, University of Virginia

Paul Fronstin, PhD, Employee Benefit Research Institute

Dyan Hes, eMed

- GLP-1 survey data: Industry and plan-level insights
- Coverage for diabetes and weight loss
- Impact of cost-control mechanisms
- Using data to guide plan action

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G17



Communicating With Plan Participants— Case Study Examples of Success



Katy Gozalka, PhD, CEBS, Heartland Health and Wellness Fund

Joanna Pineda, Matrix Group International, Inc.

- Bridging language barriers
- Driving utilization of existing offerings
- Being creative while fulfilling legal obligations

H09

Using Artificial Intelligence to Manage Health Plan Operations



David N. Levine, Groom Law Group, Chartered

Julia Posacki, SmartLight Analytics

- Overview of emerging technologies
- Evaluating practical applications: Member chatbots, data analysis and more
- Dos and don'ts in implementation
- The importance of an AI policy
- HIPAA considerations

P16



My Pension Plan Is Well-Funded—Now What? Part I: Understanding Pension Plan Risk



Benjamin P. Ablin, ASA, EA, MAAA, Horizon Actuarial Services, LLC

David Pazamickas, Horizon Actuarial Services, LLC

Congratulations—Your plan is well-funded. But don't get too comfortable.

A solid funded ratio today doesn't guarantee long-term success.

- What does it mean to be "well-funded"?
- What are the key risk factors to consider?
- How do assumption choices influence risk profile and stability?
- What is the impact of plan maturity?

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WEDNESDAY | 9:00-10:00 a.m.

H05



Prescription Drug Pipeline Update



Jeremy Fredell, *Express Scripts*

- What's coming down the pipeline?
- Specialty drug update
- Cost-containment strategies
- Legal and legislative implications

I09



Alternative Investments 101



Edward Patchett, CFA, *GCM Grosvenor*

- Defining alternative investments and core strategies
- Understanding fee structures
- Evaluate liquidity constraints and capital calls
- Assess pacing, commitments and cash flow impact
- Diversification and risk strategies
- Questions to ask before investing

P17



My Pension Plan Is Well-Funded—Now What? Part II: Considering Your Options



Benjamin P. Ablin, ASA, EA, MAAA, *Horizon Actuarial Services, LLC*

David Pazamickas, *Horizon Actuarial Services, LLC*

Once you've assessed your plan risk, it's time to consider the options. From investment strategies to benefit design to funding policies, a well-funded position opens the door to important—and sometimes difficult—decisions.

- Investment strategies tailored to plan maturity and cash flow needs
- Plan design features for long-term sustainability
- Considerations around benefit improvements
- The importance of stress testing and stochastic modeling

WEDNESDAY | 10:30-11:30 a.m.



D FINALE SESSION—The Audacity of “What If?”



Sekou Andrews, *SekouWorld, Inc.*

“What if there is a better way?” As the innovator of an audacious new category of public speaking that brought poetry to industry in unprecedented ways, Sekou has mastered the art of audacity. His 20-year career helping global brands humanize messaging began with two words: “What if?” What if we could define business our own way? What if our way could set the standard for our industry?

This inspiring and interactive speech will help you ignite that same audacity needed for you to defy convention, deny limitations and define yourselves for yourselves. It focuses on redefining the word “touch” as a metaphor for how leaders and brands can impact communities in increasingly purposeful ways. Prepare to engage your imagination and learn new strategies to help your business get in TOUCH with its humanity.



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