

# Certificate in **Global Benefits** Management

July 14-18, 2025 | Chicago, Illinois



**Learn the knowledge and skills you need to  
effectively manage your multinational workforce.**



[www.ifebp.org/globalcertificate](http://www.ifebp.org/globalcertificate)

International Foundation  
OF EMPLOYEE BENEFIT PLANS 

# Learn the essentials of managing benefits for a multinational organization.

The new world of work, with its dispersed workforces and greater global mobility, is a challenging environment for multinational employers. You need a sustainable global benefits strategy that will evolve with your organization.

This course will provide you with the latest information from global industry experts. It's an unmatched training opportunity for live, hands-on learning and dialogue with industry thought leaders.

## Why You Should Attend

If you work for (or with) multinational organizations that have global benefits responsibilities, this is the course for you!

Earning your Certificate in Global Benefits Management demonstrates your expertise and recognizes your commitment to your profession. A **limited class size** offers a unique opportunity to share challenges and solutions with your peers and get answers to specific questions that will help you in your role.

## Who Should Attend

Course content is designed for:

- Professionals working in benefits, compensation and/or human resources who have responsibility for global benefits
- Professionals working for global benefits consulting and service firms who would like to better understand the needs of their multinational clients.

**In order to earn a certificate, you must attend eight of the nine sessions offered, including the case study.**

Please make your travel plans accordingly.\*

\*See page 7 for more details.

“Mission accomplished. Great opportunity to learn and meet some amazing people from around the globe.”



**Certificate in Global Benefits Management  
Class of February 2025**

**New to global benefits?**

Join our Global Benefits Fundamentals Virtual Workshop taking place December 2-3, 2025.

**[www.ifebp.org/global](http://www.ifebp.org/global)**



**Foundation  
COMMUNITY**

**Global Benefits Online Discussion Group**

Become a member of the International Foundation and connect with others who work with global benefits. A discussion group, Global Benefits, is available as part of the Foundation Community.

**Visit [www.ifebp.org/community](http://www.ifebp.org/community) to get started!**

# Certificate in Global Benefits Management

**MONDAY** | 8:00 a.m.-4:30 p.m.

## Continental Breakfast

**Lunch** *(provided)*

### SESSION 1

#### Cross-Cultural/Diversity: The Power of Worldviews

- The path to cross-cultural competence
- Using the DIN (Describe, Interpret, Navigate), DMIS (Developmental Model of Intercultural Sensitivity) and IDI (Intercultural Development Inventory) models in your everyday interactions
- The seven dimensions of culture
- The impact of diversity and inclusion on team performance

### SESSION 2

#### Developing a Global Benefits Strategy

- Employee benefits in a global perspective
- Understanding your needs: Company, market and talent
- Management blueprint
- Diligence and efficiencies

Find additional training and resources for multinational employers. Learn more at [www.ifebp.org/global](http://www.ifebp.org/global).



## TUESDAY | 8:00 a.m.-4:00 p.m.

---

### Continental Breakfast

#### SESSION 3

##### Multinational Pooling and Offshore Retirement Plans

- What is a multinational pool?
- What benefits are poolable?
- Key steps in establishing a pool
- From concept to reality—Practical steps for implementation
- Offshore retirement plans: Terminology, design and trends

“I loved the ability to interact with the presenters and obtain their presentations to use as reference when I am working through an issue.”

### Lunch *(provided)*

#### SESSION 4 (PART A)

##### Benefit Issues Relating to International Assignments (Expatriates)

- Who: Globally mobile definitions and international terminology
- What: Global vs. U.S. programs, long- and short-term insurance needs
- Why: Standards of care, unforeseen risk, preparation and duty of care
- Where: BRICs, CIVETS, etc.
- When: Predeparture, assignment, repatriation
- How: Building an RFP

#### SESSION 4 (PART B)

##### International Health Care Systems and Wellness Trends

- ACA and the legal position of expatriate health plans
- Global health challenges
- Comparative health care models
- Developing a global health and well-being strategy

**WEDNESDAY** | 8:00 a.m.-4:30 p.m.

---

**Continental Breakfast**

**SESSION 5**

**Europe:  
Regional and Country Overview**

- Economic, workforce and political trends
- Overview of Europe and the European Union (EU): Growth, institutions, key legislation, cross-border pensions, works councils, Social Security
- Subregional perspectives: Central Europe, Eastern Europe, Nordic Region
- Country perspectives

**Lunch** *(provided)*

**SESSION 6**

**Latin America:  
Regional and Country Overview**

- Economic, workforce and political trends
- HR trends overview, including the prevalence of benefits offered in different countries
- Comparing and contrasting countries in the region
- Country perspectives



## THURSDAY | 8:00 a.m.-4:00 p.m.

### Continental Breakfast

#### SESSION 7

##### Asia Pacific: Regional and Country Overview

- Economic, workforce and political trends
- Trends in the HR, compensation and benefits environment
- Prevalence of benefits offered in different countries
- Employer view vs. employee view
- Country perspectives

### Lunch *(provided)*

#### SESSION 8

##### Case Studies and Application (Required Session\*)

Apply what you've learned during the week in a variety of mock case studies, review outstanding questions and learn from your peers in this highly interactive session.

#### IMPORTANT!

\*The Case Studies and Application session is **required** as one of the eight sessions you must attend in order to earn a Certificate of Achievement. Please make your travel plans accordingly.

## FRIDAY | 8:00 a.m.-12:00 noon

### Continental Breakfast

#### SESSION 9

##### Middle East/Africa: Regional and Country Overview

- Economic, workforce and political trends
- Unique aspects of conducting business in the Middle East
- Gulf Cooperative Council (GCC) countries' distinctive features and demographics
- Country perspectives

# Certificate in **Global Benefits** Management



## **Chicago, Illinois**

July 14-18, 2025

### **Fairmont Chicago, Millennium Park**

**Reservation Deadline:** Friday, June 20, 2025

**Rate:** US\$265.00 Single/Double Occupancy  
(Additional \$30/person per night for a 3rd and/or 4th guest)

### **Hotel Accommodations:**

Please visit our Hotel/Travel tab at [www.ifebp.org/globaljulyhotel](http://www.ifebp.org/globaljulyhotel) to book your hotel reservations and to view applicable taxes and fees. For hotel questions, contact the Registration Department at (888) 334-3327, option 2 or [edreg@ifebp.org](mailto:edreg@ifebp.org).

*This offering will be held at the Gleacher Center.*

### **Hotel Cancellation Policy:**

Cancellation within 24 hours of the scheduled arrival date will incur a cancellation fee equal to one night room rate plus tax.

*Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

**Register by June 2 to save US\$300**



## Global Benefits Experts

### **Ana Alonso**

Senior International Benefits Consultant  
Gallagher  
Miami, Florida

### **Edward I. Cha**

Senior Vice President, Global Practice Leader  
Newfront Insurance, Inc.  
San Mateo, California/Peoria, Illinois

### **Regina Chu, M.B.A.**

Director, Integrated and Global Solutions  
WTW  
Irvine, California

### **Bert D. Defever**

Senior Principal, Multinational Advisory Team  
Mercer/Mercer Marsh Benefits  
Chicago, Illinois

### **Nicholas C. Dobelbower, Ph.D., CEBS, Dip.IEB, GPHR**

Senior Vice President, Global People Solutions  
Lockton Companies  
Washington, D.C.

### **Wil J. Gaitan, ASA, CCP, EA, FCA, MAAA**

Global Benefits Consulting Practice Leader  
and Consulting Actuary  
HUB International  
Houston, Texas

### **Eduardo M. Jáuregui Morales**

Global Consultant and Partner,  
Multinational Advisory Latin America Leader  
Mercer Marsh Benefits  
Tampa Bay, Florida

### **Jison Kim**

Director, Integrated & Global Solutions Team  
(Global M&A)  
WTW  
Chicago, Illinois

### **Allen C. Koski, CEBS**

President and Chief Innovation Officer  
Insured Nomads  
Wilmington, Delaware

### **Damian Lipani, PMP**

Health Client Leader  
Alight Solutions  
Lincolnshire, Illinois

### **Bhavi Patel**

Senior Director, Integrated and Global Solutions  
WTW  
Chicago, Illinois

### **Albert Phelps, CEBS, ASA, EA, FCA, MAAA**

Area Senior Vice President  
Gallagher  
Chicago, Illinois

### **Ryan Potter, M.S., EA, FSA**

Senior Consultant, Global Actuary  
Gallagher  
Kansas City, Missouri

### **Melissa L. Ruchhoeft, J.D.**

Vice President, Senior Consultant,  
Compliance and Intellectual Capital,  
Global People Solutions  
Lockton Companies  
Los Angeles, California

### **Miguel Santos, CCP, GRP**

Global Benefits Consulting Practice Director  
HUB International  
Houston, Texas

### **Elijah Sirota, J.D., M.B.A.**

Senior Business Development Manager  
International Group Program (IGP)  
Boston, Massachusetts

*The International Foundation reserves the right to substitute speakers or sessions due to unforeseen circumstances.*

# Your Next Step in Global Benefits Education

## CONNECT

GLOBAL EMPLOYEE BENEFITS &  
WORKFORCE STRATEGIES SUMMIT

July 21-23, 2025 | Dallas, Texas



### Learn. Engage. CONNECT.

CONNECT is tailor-made to help multinational employers understand key issues, trends and solutions for developing and maintaining a global total rewards strategy. Through real-life case studies, roundtable discussions, breakout sessions, an interactive resource/solutions center and a host of networking opportunities, this premier event is designed to connect the growing community of global professionals.

[www.ifebp.org/CONNECT](http://www.ifebp.org/CONNECT)

### Sponsored Attendee Tables Available

Invite your team to share the experience! Purchase a sponsored table and invite your clients/colleagues to attend.

For more information on all conference sponsorships, including FREE exhibit tables, contact Diane Mahler at [dianem@ifebp.org](mailto:dianem@ifebp.org) or (262) 373-7656.

## REGISTRATION

Go to [www.ifebp.org/globalcertificate](http://www.ifebp.org/globalcertificate) to register.

### CONFERENCE REGISTRATION FEES

Member early: US\$3,025 | Member late: US\$3,325  
Nonmember early: US\$3,355 | Nonmember late: US\$3,655  
Early registration ends June 2, 2025.

## REGISTRATION INCLUDES

Continental breakfasts | Lunches | Beverage breaks

## POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. For details and the current policy, see [www.ifebp.org/policies](http://www.ifebp.org/policies).

## CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit with your registration for the program at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email [continuinged@ifebp.org](mailto:continuinged@ifebp.org).

*In order to earn **insurance** CE credit, you **MUST** attend **ALL** sessions offered.*



Certificate in  
**Global Benefits**  
Management



Register at  
[www.ifebp.org/globalcertificate](http://www.ifebp.org/globalcertificate)  
by June 2 to save US\$300.



6M-425

ED2511263

**International Foundation**  
OF EMPLOYEE BENEFIT PLANS



18700 West Bluemound Road  
Brookfield, WI 53045

Nonprofit Org.  
U.S. POSTAGE PAID  
INTERNATIONAL FOUNDATION  
OF EMPLOYEE BENEFIT PLANS