

Collection Procedures Institute

September 28-29, 2026

Caribe Royale Orlando | Orlando, Florida



www.ifebp.org/collections

International Foundation
OF EMPLOYEE BENEFIT PLANS 

Collection Procedures Institute

September 28-29, 2026 | Caribe Royale Orlando | Orlando, Florida

Ensuring timely collections is essential to your fund's financial health. This course equips you with the practical knowledge and strategies needed to meet your fiduciary duty in securing employer contributions. As the economy continues to evolve, staying informed on the latest trends and best practices is essential. Join expert instructors in Orlando, Florida as they share the latest legal insights, auditing techniques and fund office procedures that can strengthen your collections program. Walk away with actionable strategies to refine your policies, optimize collections and reduce administrative challenges.

Register by August 17 to save US\$300.

Who Should Attend

This course is designed for anyone affiliated with a multiemployer trust fund who has a role in or responsibility for collecting employer contributions, including:

- Multiemployer trustees
 - Labor and management
 - Pension, welfare and apprenticeship funds
 - Small and large funds
 - All industries
- Administrators
 - Salaried and third-party
 - Administrative staff
- Payroll auditors and collection coordinators
- Certified public accountants
- Attorneys.

Key Takeaways

- Understand the collections process.
- Learn the roles and responsibilities of your entire collections team.
- Explore effective strategies that yield results.
- Know how key legal decisions may impact your plans.
- Develop a list of best practices to implement.
- Access sample documents, checklists and other prototypes.
- Apply your learning as you participate in case studies.
- Network through interactive sessions, allowing you to learn from your peers.

FACULTY



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SESSIONS AT A GLANCE

MONDAY September 28, 2026	
8:00-11:30 a.m.	Module I: Team Collections
12:30-4:00 p.m.	Module II: Collections Process and Professionals
TUESDAY September 29, 2026	
8:00-11:30 a.m.	Module III: Unique Collection Issues
12:30-4:00 p.m.	Module IV: Securing Payment and Wrap-Up

(All times are listed in Eastern Standard Time.)

SUNDAY | September 27, 2026

5:00-6:00 p.m.

Registration and Information

(All times are listed in Eastern Standard Time.)

MONDAY | September 28, 2026

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

Registration and Information

7:00-8:00 a.m.

Continental Breakfast

8:00-11:30 a.m.

Module I: Team Collections

This module will lay the foundation for understanding collections, with a focus on the team approach to ensure the process is more efficient and effective.

- Understand fiduciary responsibility, including ethical, legal and financial obligations in collections.
- Navigate contractual obligations, focusing on collective bargaining and participation agreements.
- Review administrative collection and audit policies and best practices, optimizing processes, compliance and stakeholder engagement.
- Explore the use of delinquency committees.

MONDAY | September 28, 2026 *(continued)*

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

Lunch *(provided)*

12:30-4:00 p.m.

Module II: Collections Process and Professionals

This module will focus on the collections process and the professionals who help you manage your collections program.

- Best practice for a payroll audit policy and procedures
- Conduct payroll audits, from the routine to the use of alternate procedures when records are limited.
- Leverage the A-Team, collaborating with professionals to optimize collection strategies.
- Navigate the litigation process, from pre-lawsuit actions to obtaining a judgment.



Attending the program made me feel more confident. I appreciated seeing other people's approach to the collections process, and it was a nice reminder of the trustees' fiduciary duty to collect.

TUESDAY | September 29, 2026

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

Registration and Information

7:00-8:00 a.m.

Continental Breakfast

8:00-11:30 a.m.

Module III: Unique Collection Issues

This module will address unique collections issues that need special consideration.

- Manage collections beyond the signatory employer, identifying obligations and enforcement strategies.
- Assess withdrawal liability, ensuring compliance and mitigating financial risks.
- Navigate bankruptcy implications, understanding creditor rights and recovery options.
- Apply lessons from recent unique payroll audit challenges.



Visit www.ifebp.org/collections to register online.

TUESDAY | September 29, 2026 *(continued)*

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

Lunch *(provided)*

12:30-4:00 p.m.

Module IV: Securing Payment and Wrap-Up

This module will tie together the whole course and home in on getting the money.

- Maximize recoveries through settlements, applying strategic negotiation and resolution tactics.
- Execute post-judgment settlement actions, ensuring enforcement and optimizing collection outcomes.
- Conduct a mock settlement conference.

Throughout the course, knowledge will be attained and applied across all sessions through a case simulation, navigating complex collections challenges, engaging professionals, managing enforcement processes and securing final recoveries.

Hotel Information

Caribe Royale Orlando

Reservation Deadline:

Monday, September 7, 2026

Rate: US\$229 single/double occupancy
(Additional US\$15/person per night
for a third and/or fourth guest)

Taxes & Fees (subject to change):

12.5% Room Tax

Resort Fee:

US\$20/night (discounted from US\$38)

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

Hotel Details

Uncovering a Floridian escape where the sun is warm and the welcomes are even warmer, Caribe Royale Orlando is a destination that offers all the connection you could ever imagine right within reach. From adventures to afternoons spent at our sprawling pool or in the bliss of your own private suite, we're always dreaming of making each moment feel a little more like home—all while many miles away from reality.

Hotel Cancellation Policy:

Hotel deposit forfeited for reservations cancelled within 72 hours prior to arrival.

Note: Hotel room availability is not guaranteed outside of scheduled program dates. Hotel reservations are confirmed on a first-come-first-served basis. Best available rate/hotel will be assigned if necessary.

Location Details

Orlando is filled with fun things to do and theme parks such as Universal Studios and Walt Disney World Resort. Orlando also has various outlet malls, cafes and aquariums for your enjoyment. Wildlife parks and dinner shows are a great source of fun for all ages.

REGISTRATION

Register today at www.ifebp.org/collections.

	Member	Nonmember
Through August 17, 2026	US\$1,495	US\$1,715
After August 17, 2026	US\$1,795	US\$2,015

REGISTRATION INCLUDES

Continental Breakfasts | Lunches | Beverage Breaks

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before 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.

INTERNATIONAL FOUNDATION MISSION

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.

CONTINUING EDUCATION CREDIT

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

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.



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



Collection Procedures Institute

Session Topics

- Fiduciary responsibility
- Collective bargaining agreements and collection procedures
- Administrative best practices
- Payroll audits
- Judgments
- Beyond the signatory employer
- Bankruptcy
- Withdrawal liability
- Settlements
- Post-judgment collection actions

**Register by August 17, 2026 to save
US\$300 with the early registration discount!**

**Visit www.ifebp.org/collections
for more information and to register.**

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