

Investments Institute

May 5-6, 2027

Hilton Nashville Downtown
Nashville, Tennessee

**Program
Sneak Peek**

Practical Investment Education for Trustees

Education on Topics Including:

- Infrastructure
- Real estate
- Fixed income
- Economic/market update
- Global equities
- And more.

www.ifebp.org/investments

International Foundation 
OF EMPLOYEE BENEFIT PLANS

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Hilton Nashville Downtown | Nashville, Tennessee

Practical Investment Education for Trustees

Global markets are changing rapidly, and there's no end in sight. For institutional investors, that constant change brings both risk and opportunity. As a fiduciary, you must stay ahead of these shifts and position your plan to benefit from them, maximizing returns for the plan members who depend on it.

The Investments Institute delivers relevant sessions and insights led by highly regarded industry experts. You'll gain the knowledge, strategies and confidence needed to navigate the challenges ahead and ensure your plan's long-term success.

Who Should Attend

The Investments Institute is designed for experienced individuals involved in setting investment policy for both defined benefit and defined contribution retirement plans, including:

- Trustees
- Administrators and staff
- Corporate officers and executives
- Finance personnel.

**Visit www.ifebp.org/investments
to register early and save!**



Reasons to Attend the Investments Institute This Spring

1. Fiduciary-Forward Educational Content

Learn directly from respected investment experts and get your specific questions answered in an intimate setting focused on today's changing global economy. You'll leave with the knowledge, strategies and confidence to navigate the challenges ahead and ensure your plan's long-term success.

2. A Comprehensive Agenda

This conference offers a two-day agenda covering the full range of issues facing fiduciaries of defined benefit and defined contribution plans, from global economic trends to plan strategy.

3. Meaningful Peer-to-Peer Network Opportunities

Attendees gain direct access to industry professionals and peers, making it easy to find solutions and build lasting connections.

4. Innovative Answers

Take a deeper look at essential investment topics in a small-group environment built to answer your questions and help you overcome the everyday obstacles your plan faces.

Tentative Schedule

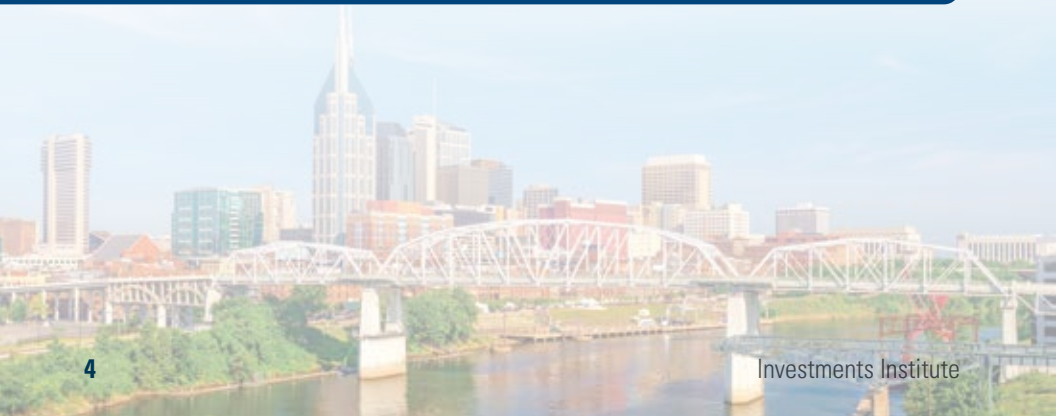
Breakfasts, lunches and networking reception included!

WEDNESDAY May 5, 2027	
7:30-8:15 a.m.	Breakfast
8:15 a.m.-12:00 noon	General Sessions
12:00 noon-1:00 p.m.	Lunch
1:00-4:30 p.m.	General Sessions
4:30-5:30 p.m.	Networking Reception
THURSDAY May 6, 2027	
7:30-8:30 a.m.	Breakfast
8:30 a.m.-12:00 noon	General Sessions
12:00 noon-1:00 p.m.	Lunch
1:00-3:15 p.m.	General Sessions

(All times are listed in Central Time.)

Note: Schedule subject to change

“It is a great opportunity to hear a variety of different viewpoints and get a strong foundation in the investments underlying promised benefits.”
—Investments Institute Past Attendee



Benefits of Attending

Walk away with the knowledge you need to be a better fiduciary for your plan. You will also:

- Learn from highly regarded experts in the field of investing
- Network with peers who are facing similar challenges
- Hear current perspectives on the global economy
- Discuss your plan's strategies with trustees from other plans
- Take advantage of the intimate learning environment and get your specific questions answered.



Concepts That Will Be Covered

- Economic outlook
- Advanced asset allocations
- Benchmarking and fees
- Active vs. passive management
- Alternative property types in real estate
- Private credit
- Infrastructure
- Fixed income
- Global equities
- Alternatives in defined contribution plans



Topics and sessions are subject to change.

Nashville, Tennessee

Nashville offers the perfect backdrop for learning and connection, blending Southern hospitality with the energy of a thriving, fast-growing city. Known as Music City, it's home to legendary live music venues, award-winning restaurants and a lively downtown just steps from the conference hotel. After a day of sessions, you can unwind with a classic Southern-style dinner, catch a performance on Broadway, or explore the city's rich history and culture.



Hilton Nashville Downtown

Hotel Name: Hilton Nashville Downtown

Reservation Deadline: Friday, April 2, 2027

Rate: \$329.00 single/double occupancy

(Additional \$10/person per night for a third and/or fourth guest)

Hotel Accommodations: You will be charged a \$450 deposit upon registration. Please specify your hotel requirements on the registration form.

Visit our Hotel/Travel tab at www.ifebp.org/investments for additional hotel information.

Resort Fee: None

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 will be assigned if necessary.

Connect, Collaborate and Grow at the Investments Institute

Some of the most valuable insights at the Investments Institute come from the people sitting next to you. The conference brings together trustees, administrators, corporate executives and finance professionals who face many of the same challenges you do. Throughout the event, you'll have opportunities to compare notes, discuss your plan's strategies with trustees from other plans and gain fresh perspectives on the issues shaping today's investment landscape.

Networking Opportunities Include:

- Networking reception
- Session breaks
- Breakfasts
- Lunches

Reconnect with familiar faces, meet new colleagues, and build relationships with peers and industry professionals that extend well beyond the conference. Whether you're looking for practical solutions or simply a sounding board, the connections you make here can become a lasting resource for you and your plan.



Sponsorship Opportunities

As a sponsor, your organization will gain valuable exposure and direct access to the experienced trustees, administrators, corporate officers and finance personnel who set policy and make investment decisions for both defined benefit and defined contribution plans. It's an ideal opportunity to build meaningful relationships, showcase your expertise and position your organization as a trusted resource for the plans shaping today's investment landscape.

Sponsorship Levels

GOLD SPONSORSHIP

- Attendee Luncheon
- Conference App (exclusive)
- Lanyards (exclusive)
- Networking Reception
- Spotlight Sponsorship

Sponsors receive one complimentary registration.

SILVER SPONSORSHIP

- Continental Breakfast
- Refreshment Break
- Design Your Own (DYO) Wellness Sponsorship
- Pens/Highlighters (exclusive)
- Notepads (exclusive)
- Hand Sanitizers (exclusive)
- Sponsor-Provided Item

Sponsors receive one conference registration at 50% off.

Contact Us Today!

Sponsorships at each level are recognized in a variety of ways, including on the conference web page and in preconference promotions, on conference signage and table tent cards at the sponsored event, with a company listing on the conference app, with **complimentary or discounted conference registrations, and more!**

Julie Ichiba | (262) 373-7674 | jichiba@ifebp.org

Health Care Management Conference

May 3-4, 2027

Hilton Nashville Downtown | Nashville, Tennessee

Looking to extend your education? Attend the Health Care Management Conference, held immediately before the Investments Institute.

Practical Solutions for a Shifting Health Landscape

Health fund fiduciaries are on the front lines of a rapidly shifting health care environment. They are tasked with balancing the needs of participants and the sustainability of their plans. Fulfilling these duties in the face of new therapies, aging plan populations and double-digit annual cost increases requires stakeholders to be nimble.

This year's conference will take a proactive approach to coverage, allowing attendees to identify trends that are driving costs and impacting outcomes while adapting to the unknown. Conference sessions will be hands-on and practical, combining lectures, interactive case studies and roundtable discussions. Each session has formal learning objectives to clearly communicate outcomes. Attendees will have direct contact with peers and industry professionals to ensure that their needs are met.

Sessions Include:

- GLP-1s and Obesity Management
- Prescription Drug Transparency
- Retiree Health Care and Medicare Strategy
- AI in Benefit Administration
- Cybersecurity and Data Privacy
- Health Care Cost Trends and Cost Containment
- And more!

Attend both the Investments Institute and Health Care Management Conference and save \$500!

REGISTRATION

Register today at www.ifebp.org/investments.

CONFERENCE REGISTRATION FEES

Through March 22, 2027	Member: \$1,850 Nonmember: \$2,070
After March 22, 2027	Member: \$2,150 Nonmember: \$2,370
Save \$300 when you register before March 22!	

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.

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.

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.



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International Foundation
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