

CHAPTER PROGRAMS SEPTEMBER 2024 – SEPTEMBER 2025

CHAPTER/DATE	TOPIC	SPEAKER(S)
Alberta 09/26/24	Webinar: Recent Legal Developments in Western Canada	Lisa Chamzuk, Partner, Lawson Lundell
Alberta 12/05/24	Webinar: From Burnout to Balance, Navigating the Challenge of Supporting Employees Caring for Family Members with Dementia	Karen Tyrell, CPCA, CDCP, CEO, Dementia Consultant and Educator Personalized Dementia Solutions
Alberta 04/02/25	Webinar: Is your workplace age friendly? Strategies to retain the wisdom of your older workers.	Michelle Oram, CEBS-Compliant, CPRC Retirement Coach, Second Life Vision
Alberta 06/04/25	Webinar: Death, Taxes & Beyond – Getting Your Financial House in Order	Mark Kalinowski, Partnership and Education Specialist, Credit Counselling Society
Alberta 12/19/25	Webinar & In-Person: AGM & Pension Governance	Susan Bird, CEBS, CAIB, EPC, ICD.D, President, The McAteer Group
Baltimore 03/24/25	In-Person: Educational Networking Social: Time to Care Act (Maryland)	David Johnson, Client Manager, Bolton Tom Vicente, Senior Consulting Actuary, Bolton
British Columbia 09/26/24	Webinar: Economic Update - How the Current Economic Environment May Impact Business and Retirement Savings Plan Decisions	Eric Lascelles, Managing Director & Chief Economist, RBC Global Asset Management, Inc.
British Columbia 10/17/24	Webinar: Legal Update 2024	Meghan Popp, Partner, Lawson Lundell LLP
British Columbia 11/27/24	Webinar: Embracing the Longevity Revolution: Transforming Society for 100+ Years	Kyra Jones, Ph.D., Chief Design Officer, Adapt with Intent Inc.
British Columbia 03/11-14/25	Webinars: GROUP BENEFITS: Health, dental and disability plans Underwriting Benefit plan administration Ancillary benefits Wellness benefits Pooled benefits GROUP RETIREMENT: Government retirement programs Defined contribution plan basics Defined benefit plan basics	
British Columbia 04/08/25	Webinar: Understanding and Nurturing Mental Health	Mike Mousseau, Mental Health Programs & Business Development Manager, GreenShield Health
British Columbia 06/17/25	Webinar: The M Shift: Midlife and Menopause Reboot	Cathy Waterman, Owner, Spark Vitality
British Columbia 10/15/25	Webinar: 101 Steps to Retirement Planning	Chris Morrison, Financial Wellness and Member Transition Manager for HUB International
British Columbia 09/18/25	Webinar: Leveraging the Benefits of Resilience for Real ROI	Carré Le Page, Storyteller, Traveler, Resilience Expert

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Carolinas 10/29/24	Webinar: Unlock the Power of Student Loan Repayment Benefits: Boost Your Recruitment and Retention with Student Loan Benefits	Beth Krasnow
Carolinas 11/14/24	Webinar: Emergency Savings Accounts	
Carolinas 04/10/25	Webinar: ERISA Lawsuits are Here: How to Comply with the New Employer Fiduciary Responsibility	Chelsea Ricki's, President, Ethos Benefits
Carolinas 06/24/25	Webinar: Roadmap to Medicare	Tracy, Russo, CEO, HTA
Carolinas 07/09/25	Webinar: Next Gen Retirement & Workplace Savings Benefits: SECURE 2.0 and Beyond	Joe Dillion, CFP, Managing Director, Creative Planning Retirement Services Samuel Henson, J.D., Legal Counsel, Creative Planning Retirement Services
Carolinas 09/23/25	Webinar: Leave and Accommodation Law Updates	Abigail O'Connell, AVP & Senior Counsel, Sun Life
Chicago 01/15/25	In-Person: Lifestyle Benefit Accounts (LSA) for 2025	Sean Hughley
Chicago 03/17/25	Webinar: Shifting Health & Welfare Benefit Trends	Drew Rasmussen, CEBS, Mercer Nancy Vick, CEBS, Mercer
Chicago 03/20/25	Webinar: Can AI Help Make Healthcare Affordable	Sasha Gribov, Co-Founder, Milu Health
Chicago 04/09/25	In-Person: What to Do When There is No Playbook?	Dave O'Connor, International Coaching Federation Associate Certified Coach
Chicago 10/09/25	In-Person: Mental Health Matters: Meaningful Strategies to Promote "Working Well"	Jitana Bagomolny, VP, Clinical Team, Personify Health
Colorado 04/11/25	Webinar: Wellness Successes at the City and County of Denver	Lizzie Schoon, MPA, GBA, Senior Benefits Analyst, City and County of Denver
Colorado 06/26/25	Webinar: Health Plan Fiduciary Duties in the Ongoing Era of Transparency and Data Insecurity	Laura Miller, JD, Compliance Consultant, Alliant Insurance Services
Dallas/Ft. Worth 09/12/24	Webinar: ERISA at Fifty: The Shifting Landscape of Employee Benefits	Brian Giovannini, Employer Benefits Attorney, Haynes and Boone
Dallas/Ft. Worth 02/13/25	Webinar: 2025 Retirement Plan Roadmap: Legal Insights for the Year Ahead	Anne Meyer, Snell & Wilmer L.L.P. Jim Griffin, Snell & Wilmer L.L.P.
Dallas/Ft. Worth 03/27/25	Webinar: Embrace Financial Strategies to Reduce Healthcare Costs	Chris Chan, Chief Value Officer, finHealth
Dallas/Ft. Worth 07/11/25	In-Person: Motivational Session – From Stuck to Starting: Get Unstuck from Your Rut	Ashley, The Life Coach
Dallas/Ft. Worth 05/22/25	Webinar: Pharmacy Benefit Managers - What ERISA Fiduciary Duties Relate to Prescription Drug Plans	Mary Powell, Director, Trucker Huss
Dallas/Ft. Worth 09/11/25	Webinar: Review and Negotiation of Benefit Plan Service Provider Agreements	Tom Hogan, Counsel, Haynes Boone
Detroit 10/24/24	In-Person & Webinar: Fiduciary Responsibilities Recap	Stephanie Thwaites-Mattei, CEBS Rhonda Van Tiflin, CEBS Jonathon Trionfi, CEBS

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Detroit 12/10/24	In-Person: Top 10 Health Benefit Trends of 2024	Stephanie Thwaites-Mattei, CEBS
Detroit 03/31/25	Webinar: AI in Benefits	Sasha Gribov, Co-Founder, Milu Health Ian Seffernan, Co-Founder/CTO, Goodbill
Detroit 08/28/25	Webinar: The Big Beautiful Bill	Venessa Blanco, J.D., LL.M., Associate General Counsel, Acrisure Mark Hillier, Client Advisor and Partner, Acrisure
Georgia 12/18/24	In-Person: Legal Updates	
Georgia 08/27/25	In-Person: The Impact of AI on the Workforce	Mitzi Herrig, Market Growth Leader, Aon
Greater Boston 10/24/24	Webinar: Key Ingredients for Successful LTC Enrollments	Marc Glickman, CEO and Founder, BuddyIns
Greater Boston 01/30/25	Webcast: SECURE 2.0	
Greater Boston 06/12/25	In-Person: Audit Experiences	
Greater Boston 09/18/25	Webinar: Education and Networking Session: Readiness for Catch-Up Contributions as Roth for High Earners	
Greater Philadelphia 10/18/24	In-Person: Summit 2024: HR Synergy: Integrating People, Technology, and Strategy w/GVFHRA	
Greater Philadelphia 02/19/25	Webinar: Medicare Landscape 2025	Tracy Keeseey, CISR, President, Director of Property & Casualty Operations, HTA Insurance Services Kathleen Bretzel, Director of Strategic Relations, HTA Insurance Services
Greater Pittsburgh 10/03/24	Webinar: Maximizing Vendor Value: Strategies for Optimal Vendor Relationships	Dana Baker, M.B.A., Senior Director, Mayo Clinic
IS Chapter Webcast 10/8/24	Webinar: DOL Developments for Retirement Plans	Steven Grieb, CEBS, Sr Compliance Counsel, Gallagher
IS Chapter Webcast 10/17/24	Webinar: CAM Navigating an Integrated Ecosystem of Healthcare Options	Colleen Kavanagh, CEO, SoulBeing
IS Chapter Webcast 10/22/24	Webinar: Health Equity in Action	Jennifer Davis, MBA, MS, Principal, Evernorth Vaishali Geib, MD, Market Medical Executive, Cigna Healthcare
IS Chapter Webcast 11/07/24	Webinar: Menopause: The Women's Health Revolution and Employer Support Strategies	Tara Anstey, Dir Business Development, Client Value, Medavie Blue Cross Angela Johnson, CEO & Co-Founder, sanoLiving
IS Chapter Webcast 02/13/25	Webinar: The Compelling Need for Financial Literacy Workshops in the Workplace	George Morin, CEBS, Relationship Manager, RBC Group Advantage
IS Chapter Webcast 02/26/25	Webinar: What you need to know about Roth	Lena Gionnette, Counsel, Nixon Peabody Eric Paley, Partner, Nixon Peabody
IS Chapter Webcast 03/26/25	Webcast: Fiduciary Process, Plan Design and Financial Wellness	Jamie Hayes, Senior Vice-President, NFP Retirement Inc.

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IS Chapter Webcast 04/01/25	Webcast: Lessons Learned from Implementing AI for HR Teams in 2025	Kate Bernier, Co-founder and COO, Airbo Vlad Gyster, Co-Founder and CEO, Airbo
IS Chapter Webcast 08/13/25	Webinar: The Future of DEI in the Private Sector	Sarah Goodman, Principal Attorney, Offit Kurman
IS Chapter Webcast 09/04/25	Webinar: Making Retirement Plans Work in Retirement	Sharon Carson, Retirement Strategist, JPMorgan Asset Management Ralph Corasaniti, VP, Defined Contribution Lifetime Income, Prudential Financial Daniel Yem, Head of Retirement Income, JPMorgan Asset Management
IS Chapter Webcast 10/02/25	Webinar: Price Transparency for Plan Sponsors: Leveraging New Data to Support Benefits Strategy	Erica Reijula, Sr. Consulting Actuary, Milliman Mike Gaal, Principal and Consulting Actuary
Kansas City 11/21/24	Webinar: Health Benefits Under COBRA: What You Need to Know	Christyona Pham, Senior Benefits Advisor, U.S. Department of Labor, Employee Benefits Security Administration
Kansas City 02/13/25	In-Person: Benefits Policy Agenda for 2025	Jim Klein, President, American Benefits Council
Kansas City 09/11/25	In-Person: Benefits Briefing: Legal Strategies for 2025 and Beyond	Spencer Fane LLP
Los Angeles 01/22/25	In-Person: Legislative Update	Marilyn Monahan, Owner, Monahan Law Office
Los Angeles 04/02/25	In-Person/Virtual: Retirement Basics: Essential Knowledge for HR & Benefits Professionals	Crytal Coleman, CPA, Principal, Employee Benefit Plans, CliftonLarsonAllen LLP Karen Casillas, AIF®, CPFA®, CFS, NQPC™ VP, Financial Advisor, CAPTRUST
Los Angeles 06/12/25	In-Person: Benefits Basics Course -Retirement Basics (Part 1 and Part 2) -Employee Benefits Compliance -Employee Benefits Administration	Crystal Coleman, CEBS, Principal, CliftonLarsonAllen Karen Casillas, Vice President, Financial Advisor, CAPTRUST Liliana Salazar, Chief Compliance Officer, HUB Karen Hallsman, CEBS, Senior Benefits Manager, MarketCast Iyaseli Castorena, CEBS, Benefits Manager, Rocket Lab
Los Angeles 09/24/25	Webinar: Reference-Based Pricing: The Vendor + Employer Perspective	Matt McCuen, National Sales Executive, Imagine360 Mikki Williams, Vice President, Total Rewards, C1
Middle Tennessee 04/01/25	Lunch & Webcast: Lessons Learned from Implementing AI for HR Teams in 2025	Kate Bernier, Co-founder and COO, Airbo Vlad Gyster, Co-Founder and CEO, Airbo
Middle Tennessee 08/13/25	In-Person/Webinar: The Future of DEI in the Private Sector	Sarah Goodman, Principal Attorney, Offit Kurman
Middle Tennessee 10/02/25	In-Person/Webinar: Price Transparency for Plan Sponsors: Leveraging New Data to Support Benefits Strategy	Erica Reijula, Sr. Consulting Actuary, Milliman Mike Gaal, Principal and Consulting Actuary, Milliman
Milwaukee 03/18/24	In-Person/Virtual: Recent Retirement Plan Developments	Steven E. Grieb, Senior Compliance Counsel, Arthur J. Gallagher & Co.

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Milwaukee 10/09/24	Webinar: Why Weight? You Need to Know This Now! Drug Coverage & Other Weight Loss Program Considerations	Eileen Pincay, R.Ph., Sr VP and Natl Pharmacy Practice Leader, Segal Len Spangher, CEBS, MHP, VP & Senior Consultant, Segal
Milwaukee 12/05/24	Milwaukee: 2024 Legal Update	Katherine Kratcha, Attorney, Employee Benefits, Reinhart Boerner Van Deuren David Eckhardt, Attorney and Partner, Employee Benefits and Executive Compensation, Husch Blackwell
Milwaukee 09/23/25	In-Person/Webinar: Employer's Guide to Medicare, Recent Updates to Medicare D	Jeff Martin, Partner, ePlatinumHealth Rae Anne Beaudry, Senior VP Regional Employee Benefits, Practice Group Leader, USI Insurance
Nebraska 11/12/24	Webinar: The Evolution of Pharmacy What You Need to Know About Weight Loss Medications	Matt Jarvis, VP, Practice Leader, Lockton Pharmacy Consulting
Nebraska 04/22/25	Webinar: The Second Trump Administration – Reshaping the Landscape of Labor and Employment Law	Ashley Connell, JD, Attorney, Woods Aitken
Nebraska 06/26/25	In-Person: Effective Change Leadership: Navigating Transitions with Confidence	Stacey Meade, CEBS, Senior Consultant, Stop At Nothing
New York Metro 10/16/24	In-Person & Webinar: Artificial Intelligence (AI) and Your Organization	Michael Stoyanovich, CDPSE, VP Administration and Technology, Segal
New York Metro 05/21/25	Webinar: Employee Benefits Briefing	Nixon Peabody
New York Metro 05/29/25	Webinar: Creating a Culture of Ownership in the Era of AI	Kyle Buerger, Leadership Development Coach, KB Breakthrough Consulting
New York Metro 07/01/25	In-Person & Webinar: Form 5500	Lou Librandi, CEBS, Partner Employee Benefit Services Group, PKF OConnor Davies LLC
New York Metro 10/29/25	Webinar: Employee Benefits Briefing with Nixon Peabody	Lena Gionnette, Counsel Emily Morrison, Associate Christian Hancey, Partner Damian Myers, Partner Eric Paley, Partner Emily Pellegrini, Associate
Northern California 02/25/25	Webinar: Legal Update: Are you Ready for 2025?	Marilyn A. Monahan, Owner, Monahan Law Office
Northern California 04/03/25	Webinar: It's Time to Future Proof Your Pharmacy Benefit	Josh Golden, Senior Vice President, Strategy, Capital Rx
Northern California 07/16/25	Webinar: GLP-1 Medications: Balancing Cost Care and Demand in Employer Health Plans	Stephanie Peterson, Principal and Consulting Actuary, Milliman
Northern California 10/23/25	In-Person: The Serious Business of Happiness: Financial Case & Practical Tools	Jackson Kerchis, Partner, Happiness Means Business
Northern New Jersey 11/17/24	Webinar: The Possible Legislative Impact of the Presidential Election	Gary Kline, Senior Principal, Federal Government Affairs, Evernorth
Northern New Jersey 03/25/25	Webinar: 39 th Annual Mercer Survey Results	John Coleman, CEBS, Senior Principal, Mercer Paul Cimino, J.D., Mercer

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Northern New Jersey 04/23/25	Webinar: Lifestyle Spending Accounts (LSAs) and Caregiver Benefits	Zac Johnson, Executive Sales Director, Wex Griffen Kelly, Senior Director of Partnership Development, Cariloop
Northern New Jersey 05/28/25	Webinar: Can AI Help Make Healthcare Affordable?	Sasha Gribov, Co-Founder and CEO, Milu Health
Northern New Jersey 10/20/25	Webinar: Federal Beltway Insights of 2025	Chris Hartmann, Principal, Federal Government Affairs, Cigna Group
Pacific Northwest 10/09/24	Webinar: Terminated Vested Participant Project (TYPP)	Tara Causland, Benefits Advisor, US DOL EBSA
Pacific Northwest 01/08/25	Webinar: COBRA	Tara Causland, Benefits Advisor, U.S. Department of Labor, Employee Benefits Security Administration (EBSA)
Pacific Northwest 04/16/25	Webinar: Captive 101: Why and How to Establish a Captive	Stephanie Peterson, FSA, CERA, MAAA, Principal and Consulting Actuary, Milliman Mike Meehan, CIC, CRM Consultant, Principal, Milliman
Pacific Northwest 09/10/25	Webinar: Paid Leave Laws: Understanding State & Local Challenges, Trends and Best Practices	Abbey Hendricks, CEBS, Vice President, Aon Ambrosia Nelson, CPDM, Vice President, Time Away & Life Solutions, Aon
Richmond 06/10/25	In-Person: Collaborative Insights: Mercer & Marsh McLennan Present the 2025 Survey Findings	Kristin Henshaw, CEBS, Senior Principal, Mercer Lisa Camerose, RN, BSN, MBA, VP, National Clinical Management Consulting, Marsh McLennan Agency
Southwestern Ontario 11/13/24	Webinar: Is Your Workplace Age Friendly? Strategies to Retain the Wisdom of Your Older Workers	Michelle Oram, CEBS-Compliant, CPRC, Retirement Coach, Second Life Vision
Southwestern Ontario 06/11/25	Webinar: Pharmacy Landscape and Impact on Benefit Plans	Scott Campbell, Pharmacist and Director of Plan Analytics, Cubic Health
St. Louis 12/10/24	Webinar: Post-Election Benefits Update	Bill Fegurson, Attorney, mercer
St. Louis 03/05/25	Webinar: Aiming at the Wrong Target – What's Holding Employers Back When It Comes to Older Workers?	Jack Towarnicky, CEBS, Of Counsel, Koehler Fitzgerald, LLC
St. Louis 06/25/25	In-Person: Employee Benefits Legal Update	Amy Stansfield, Employee Benefits Attorney, Thompson Coburn LLP.
St. Louis 09/24/25	In-Person: New Perspectives in Employer Health Plans: From Expert Insight to Peer Discussion	Ashley Vander Linde, Head of Sales, AffirmedRX
SWO & Toronto Chpts 10/21/24 – 10/24/24	Webinar Series: Fundamentals of Group Pensions Introduction to Social Programs & Private Plans Plan Governance and Administration Investments 101 Member Education & Communication	Robin Cox, CEBS, Senior Director, Global Benefits, Immigration & Health & Safety, BlackBerry Alicia Hesch, CEBS, Client Relationship Executive, Sunlife Michelle Oram, CEBS, Retirement Coach, Second Life Vision

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SWO & Toronto Chpts 05/27/25 - 05/29/25	Webinar Series Life & Wellness Benefits Health & Dental Benefits Workplace Disability Benefits Group Underwriting Principles Modern Benefits Programming	
SWO & Toronto Chpts 10/24/25 – 10/30/25	Webinar Series: Fundamentals of Group Retirement Plans	
Tampa 01/15/25	In-Person: Benefits Cybersecurity	
Twin Cities 09/24/24	Webinar: 2024 ISCEBS Annual Benefits Symposium Highlights and Discussion	
Twin Cities 11/09/24	In-Person: Tune In and Turn On Your Brain: Mental Health Strategies for Yourself and Your Organization	Caitlyn Richey, Consultant, Well-Being and Engagement, NFP
Twin Cities 11/19/24	In-Person: Mental Health Strategies for Yourself and Your Organization	Caitlyn Richey, Consultant, NFP
Twin Cities 02/18/25	Webinar: Coordination of the Vendor Ecosystem? Elevating Employee Support and Improving Vendor Strategies	Lianne LaTorre, Director, Mayo Clinic Brent Westra, Director, Mayo Clinic
Twin Cities 03/18/25	Webinar: The American Benefits Council: How Might the New Administration and New Congress Impact the Work of Benefit Professionals in 2025 (Speakers are from The American Benefits Council)	Katy Johnson, President Lynn D. Dudley, Senior Vice President, Global Retirement & Compensation Policy Ilyse Schuman, Senior Vice President, Health & Paid Leave Policy Diann Howland, Vice President, Legislative Affairs
Twin Cities 04/22/25	In-Person: Beyond the Buzzwords: Crafting Benefits Communications that Resonate with your Workforce	Alex Lanning, National Director of Communications, CBIZ Employee Benefits Megan Kelly, National Communications Manager, CBIZ Employee Benefits
Twin Cities 05/20/25	In-Person: Spring Benefits Showcase Minnesota Paid Family and Medical Leave Administration Mercer's Annual Benchmarking Study	Brycie Wasson, Consultant, Total Absence Management, The Partners Group Gulsah Mattson, Minneapolis Health Business Leader at Mercer
Twin Cities 08/06/25	In-Person: Fall into 2026 Fall Seminar: Mental and Financial Wellbeing -An Employee-First Approach to Financial Wellness -Effective Mental Well-Being Strategies	Ken Zarske, CPFA, Managing Director, Creative Planning Danielle Seraphine, CWPC Health and Wellness Consultant, Brown and Brown
Twin Cities 11/18/25	Webinar: Employer's Role in Helping Employees Achieve a Successful Retirement	Leonard Comberiate, CEBS, CBP, SPHR-SCP, RIA, CECF