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| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| Dallas/Ft. Worth  02/08/24 | Webinar: Cybersecurity Best Practices for Benefit/HR Policies | Vaughn Manning, CISSP, Senior IT Security  Engineer, Transwestern |
| British Columbia  02/13/24 | Webinar: Gen Z Is Coming: Can Your Benefits Attract and Retain the Next Generation? | Matt Berndt, Career Strategist, Indeed's   Job Search Academy |
| New York Metro  02/14/24 | Webinar: Results of the Bureau of Labor Statistics Survey | Bruce Bergman, Regional Economist of the  U.S. Bureau of Labor Statistics |
| Atlantic Canada  02/15/24 | In-Person: Education Session (3 hours)  -Understanding pension and investment   basics  - Exploring current market trends in pension   and benefits  - Maximizing benefits for today's multi-  generational workforce | Blue Cross, Canada Life, Desjardins |
| Twin Cities  02/20/24 | Webinar: Make the Most of your FSA, HAS or HRA Plans | Terri Jo Halverson, CEBS, HSA & CDHP   Leader |
| West Michigan  02/25/24 | In-Person: Trends in Employee Recognition Programs | Becki Good, O.C. Tanner |
| IS Chapter Webcast  02/27/24 | Webinar: GLP-1s & Biosimilars - What to Know About this Trend | Chris Batson, Vice President Client   Management, Aetna  Nina Homan, Clinical Director, Aetna |
| Toronto  02/27/24 | In-Person: Tales from the HR Crypt – Managing Your Ghost Employees | Stuart Rudner, Rudner Law |
| Northern New Jersey  02/27/24 | Webinar: Fertility Benefits | Parmpreet Mann, Account Manager,   Progyny |
| British Columbia  03/05-08/24 | Webinars (4) Fundamentals of:  Group Benefits and Pension Plans |  |
| New York Metro  03/13/24 | Webinar: Legal Update | Eric Paley, Partner, Nixon Peabody  Lena Gionnette, Counsel, Nixon Peabody |
| Los Angeles  03/19/24 | Webinar: Innovation in Pharmacy Benefits that Control Cost and Provide Transparency | Roger, Tiao, PharmD, Principal Pharmacist,  Pharmacy Sales & Accounts, Blue Shield |
| Northern New Jersey  03/19/24 | Webinar: Why Weight? You Need to Know This Now: Drug Coverage & Other Weight Loss Program Considerations | Eileen Pincay, R.Ph., Vice President,   National Pharmacy Practice Leader,   Segal  Len Spangher CEBS, MHP, Vice President &   Senior Consultant, Segal |
| Pacific Northwest  03/21/24 | Webinar: Benefits 101: Medical SBC Walkthrough (provided by The Benefits Academy) | Speaker: Sandra Wood, CEBS, Chief   Benefits Consultant |
| IS Chapter Webcast  03/25/24 | Webinar: Supporting the Fertility Life-cycle with Benefits for Milestone Moments | Dr. Janet Choi, Chief Medical Officer,   Progyny  Stacey Hofert, Group Vice President,   Labor, Progyny |
| Pacific Northwest  03/27/24 | Webinar: Medicare Made Easy for Employers | James D. Davidson, CLU, CPA, ChFC, CEBS,  Chairman & Chief Executive Officer, EOI   Service Company, Inc. |
| British Columbia  04/04/24 | Webinar: The Compelling Need for Financial Literacy Workshops in the Workplace | George Morin, Relationship Manager, RBC   Group Advantage |
| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| Greater Philadelphia  04/04/24 | Webinar: Emerging Trends in Health Care (w/GVFHRA) | Brian O’Malley, CEBS, Senior Director,   Market Leader, Willis Towers Watson |
| Greater Pittsburgh  04/10/24 | Webinar: Current Topics in Retirement Plan Compliance | Peter Scott, JD, Senior Consultant, Marsh   McLennan Retirement Services |
| Colorado  04/11/24 | Webinar: Practical Application of a 4-Day Workweek | Laura Earley, CEBS, Account Executive,   Employee Benefits, IMA |
| Dallas/Ft. Worth  04/11/24 | Webinar: Healthcare in a Union Environment | Gregg Thorsen, Retired (former Managing   Director Total Rewards, Southwest   Airlines) |
| Northern New Jersey  04/13/24 | Webinar: 38th Annual Mercer Survey Results | John Coleman, CEBS, Senior Principal,   Mercer |
| IS Chapter Webcast  04/17/24 | Webinar: The Dangers of Credit Illiteracy to Staff and The Workplace | Tim St. Vincent, Financial Literacy   Educator, Credit Counselling Society |
| Twin Cities  04/16/24 | In-Person: Preparing Your Employees for Retirement | Stephen Jans, Vice President Wealth   Management, NFP |
| Alberta  04/17/24 | Webinar: Learning & Development in a New Era of Retirement | Kyra Jones, Chief Design Officer, Adapt  with Intent |
| British Columbia  04/19/24 | Webinar: Emergence of Plan Sponsor Pharmacies & Difference in Various Pharmacy Business Models | Mike Sullivan, Chief Executive Officer,   Cubic Health |
| Chicago  04/24/24 | Webinar: Top Employee Benefit Trends for 2024 | Dr. Nancy Morehouse, EdD, CEBS, CPCU,   AI & Human Capability Strategist |
| Detroit  04/30/24 | In-Person: Pharmacy Benefit Management - The Evolving Complexities Expert Panel | Ben Korman, PharmD, MMA Rx Solutions  Joe Wear, RN, BSN, MBA, MMA Rx   Solutions  Hope May, PharmD, MMA Rx Solutions |
| Kansas City  05/01/24 | Webinar: ERISA Basics for Health Plans | Greg Ash, Partner, Spencer Fane |
| Milwaukee  05/02/24 | In-Person/Webinar: How Employers Curb Healthcare Costs by Putting Their Employees First | Sara Hames, CEBS, Principal, NBS Advisors  Megan Zimmerman, CSFS, Senior Vice   President-Employee Health & Benefits,   Marsh McLennan Agency (MMA) |
| Richmond  05/02/24 | In-Person: 2024 Educational Event  - Adapting Benefits Strategies to Improve   Attraction & Retention  - GLP-1 Update: Diabetes-Weight Loss | Kristin Henshaw, CEBS, Senior Principal &   Health Practice Leader, Mercer  Julie Kulawiec, Vice President, Pharmacy   Account Management, CarelonRx |
| IS Chapter Webcast  05/07/24 | Webinar: Wake Up Call: The Unseen Impact of Sleep Deprivation | Lana Walsh, Sleep & Insomnia Expert,   High Q Wellness |
| Northern New Jersey  05/07/24 | Webinar: Providing Confidence by Driving Higher Value Healthcare | Sean Young, Regional Sales Lead –   Northeast, Healthcare BlueBook |
| Los Angeles  05/08/24 | Webinar: Changes to the California State Disability Insurance and Initial Reactions | Max Mayotte, Chief Financial Officer,   Innovation Care Systems |
| Dallas/Ft. Worth  05/09/24 | In-Person: CE Day  - Organ Transplant  - What to Expect from an EBSA Investigation  - The Mental Health Parity and Addiction   Equity Act  - Ethics | Guy Finley, Tokio Marine HCC Tina Godfry, Senior Advisor for Health   Investigations, the Department of Labor  Gentry Lynn, Healthcare Bluebook |

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| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| New York Metro  05/15/24 | Virtual Event: Benefits 360  - Getting Serious About Controlling Health   Care Costs  - The Impact of Inclusive Leadership  - From Burnout to Brilliance – The Impact of   Dependent Care Benefits on the Sandwich   Generation  - Building Toward Better outcomes, 2023 MFS   DC Plan Sponsor Survey  - The Faces of Financial Wellness: The   Different Services Available & Pros/Cons of   Each | Dr. Eric Bricker, MD, Internal Medical   Physician & Former Co-Founder and   Chief Medical Officer, Compass   Professional Health Services  Whitney White, Senior Culture & DEI   Consultant; Chair of MMA’s Black Lives,   Affecting Change & Collaboration   (BLACC) Enterprise Colleague   Resource Group, Marsh McLennan  Jude Mmereole, Founder and Chief   Executive Officer, MyWoosah  Richard Rowehl, Retirement Plan   Specialist, Marsh McLennan Agency  Peter A. Delaney, CFA, Director,   Investment Solutions Group |
| Southwestern Ontario  05/16/24 | Webinar: 2023 Drug Trends Report | Ned Pojskic, Vice President Pharmacy   Benefits Management, GreenShield |
| Twin Cities  05/21/24 | In-Person: Spring Showcase  - AI & Benefits  - PBM Transparency |  |
| Los Angeles  05/23/24 | Webinar: Navigating the Latest Leave and Accommodation Laws | Abigail O’Connell, Senior Counsel, Sun Life |
| Southwestern Ontario and Toronto 05/27-31/24 | 2024 Webinars (4): Fundamentals of Group Benefits  - Group Life Insurance, AD&D Benefits  - Workplace Wellness Programming  - Health & Dental Benefits  - Workplace Disability Benefits  - Group Underwriting Principles  - Modern Benefits Programming | Bisrat Brown, CEBS, Account Manager,   Telus Health Solutions Sarah Abdelnour Abbi O’Neill, CEBS, Vice President,   Strategic Initiatives, Mosey & Mosey  Lianne Clarke, Senior Benefits Consultant,   Cowan Insurance Group  Jonathan Chan, Principal Consultant,  People Corp.  Samanth DiNardo |
| British Columbia  05/30/24 | Webinar: Group Benefits: Where are we now and where are we headed? | Meghan Vallis, CEBS, Group Sales Vice   President, Western Canada, Equitable |
| Greater Boston  05/30/24 | Webinar: Dementia Friends Information Session: Increasing Awareness of What Dementia Is and Is Not | Beth Posner-Waldron, CEBS, Benefits   Counselor, Worcester State University |
| IS Chapter Webcast  06/04/24 | Webinar: Building a Better Future: Optimizing Benefits Outcomes Through Behavioral Science | Tom Armstrong, Vice President, Customer   Analytics and Insight, Voya Financial |
| IS Chapter Webcast  06/11/24 | Webinar: Use Cases for AI within Employee Benefits | Michael Perlmutter, Senior Vice President,   Insights and Innovation, Lockton |
| Alberta  06/12/24 | Webinar: What About Retiree Benefits? | Art Babcock, MBA, CLU, CEBS, Consultant |
| Tampa  06/12/24 | In-Person: Johnson & Johnson Fiduciary Lawsuit | Andrew McLaughlin, Esq., Stearns Weaver  Miller |
| Northern New Jersey  06/17/24 | Webinar: Social Security – Preparing for Retirement | Karen Ireland, CFP, Senior Strategist of   Business Development, MFS   Investment Management |

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| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| Carolinas  06/18/24 | Webinar: HR Guide to Medicare 2024 | Tracy Russo-Keesey, President & CEO, HTA   Insurance Services |
| British Columbia  06/19/24 | In-Person: Trends, Developments and Today’s Most Common HR Challenges | Ryan Anderson, Mathews, Dinsdale &   Clark LLP |
| Carolinas  06/20/24 | Webinar: Benefits Trends in the Carolinas and Annual Mercer Survey Insights | Joseph E. Harten, JD, CEBS, Partner and   Health & Benefits Office Practice   Leader, Mercer |
| IS Chapter Webcast  06/25/24 | Webinar: Are Lifestyle Spending Accounts a Fad or Must Have? | Sean Hughley, Director of Sales, Forma |
| New York Metro  06/25/24 | Webinar & In-Person: Employee Benefit Plans Form 5500 and Beyond Update | Louis F. LiBrandi, CEBS, Anthony Bianchi,  CEBS, PKF O’Connor Davies Joel Sowell, CPA, Keely Portillo, Tax   Supervisor, PKF O’Connor Davies |
| Milwaukee  06/26/24 | In-Person/Webinar: Financial Wellness – Employee Education Programming that Relieves Stress and Improves Productivity | Scott Schwartz, NQPA, Senior Relationship  Manager, Spectrum Investment   Advisors |
| St. Louis  07/10/24 | In-Person: The Pharmaceutical Frontier: Navigating Through the Changing Pharmacy Landscape | Candice Michaelson, General Manager,   CIGNA Pharmacy |
| British Columbia  07/17/24 | Webinar: Collaborative and New Approaches to Disability Management | Melisa Joyal, CEO Reclaim Rehabilitation  Consulting |
| Carolinas  07/18/24 | Webinar: Build a Connected Culture in the Age of Distance and Distraction | Jim Priebe, Chief Strategy Officer,   Empyrean |
| Pacific Northwest  07/24/24 | Webinar: MetLife’s 22nd Annual U.S. Employee Benefits Trend Study 2024 | Vincent Branchesi, National Director,   Group Benefits Center of Excellence,   MetLife  Matt Hall, Voluntary Specialist Director –   West, Regional Market, Group Benefits,   U.S. Business, MetLife  Alex Vachon, Pacific Northwest Regional   Director, MetLife |
| Los Angeles  07/25/24 | In-Person: Benefits Basics  -Health & Welfare Compliance Checklist  -Employee Benefits Administration &   Strategy  -Fundamentals of Retirement Administration  -Retirement Compliance Checklist | Michelle Cammayo, CEBS, Compliance   National Practice Lead, IMA Financial  Michelle Landrum, CEBS, Employee   Benefits Consultant, IMA Financial  Karen Hallsman, CEBS, Benefits Manager,  MarketCast  Debbie Freeman, Director of Corporate   Benefits, Tetra Tech  Crystal Coleman, CEBS, Principal, CLA  Rodney Balbuena, Managing Director,   Sageview |
| Greater Pittsburgh  07/31/24 | Webinar: Tackling Your FMLA Troubles | Hannah Furlong, Lincoln Financial |
| Northern California  08/07/24 | Webinar: How AI Unlocks the Human Potential of Benefits Teams | Bernier, COO and Co-Founder, Airbo  Jon Stenstrom, Head of Product, Airbo |
| Dallas/Ft. Worth  08/08/24 | Webinar: Obesity in the Workplace: Using the Employer Lens for Accountable Obesity Management | Courtney Walker, Pharm.D., R.Ph, Medical   Account Director, Novo Nordisk, Inc. |
| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| Greater Pittsburgh  08/13/2024 | Webinar: Are You in a Dysfunctional Relationship with the Security Team? | Lisa Plaggemier, National Cybersecurity   Alliance |
| Pacific Northwest  08/14/2024 | Webinar: Mental Health Parity | Tara Causland, Benefits Advisor, US DOL  Jamidi Daiess, Senior Advisor, US DOL |
| Colorado  08/15/2024 | Webinar: PBMs/PBAs and the Good, Bad, and Ugly | Joey Dizenhouse, FSA, MAAA, President &   CEO, SlateRx |
| Twin Cities  08/20/24 | In-Person: Benefits Morning  - Challenges of MN Paid Family and   Medical Leave Administration  - Optimizing Healthcare Costs: Proactive   Approach to Chronic Conditions |  |
| British Columbia  08/21/24 | Webinar: Navigating Disability Claims in 2024 | Vanessa Palmer, Disability Management   Consultant, Manulife |
| Greater Pittsburgh  08/27/2024 | Webinar: Health and Welfare Compliance Update | Nancy Ciganik, MMA |
| Baltimore  08/30/24 | Webinar: Benefit Compliance: DOL Preparedness | Michelle Cammayo, CEBS, RHU, Employee   Benefits National Practice Leader,   Bolton |
| Dallas/Ft. Worth  09/12/24 | Webinar: ERISA at Fifty: The Shifting Landscape of Employee Benefits | Brian Giovannini, Employer Benefits   Attorney, Haynes and Boone |
| Twin Cities  09/24/24 | Webinar: 2024 ISCEBS Annual Benefits Symposium Highlights and Discussion |  |
| Alberta  09/26/24 | Webinar: Recent Legal Developments in Western Canada | Lisa Chamzuk, Partner, Lawson Lundell |
| 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. |
| Greater Philadelphia  10/02/24 | In-Person: Fall Program: How Guardian Nurses Help Employers and Employees and The Latest Generation of Fiduciary Failures | Deana A. Calvelli, CEBS, CPFA®, AIF®, Vice   President, Wealth and Retirement, NFP  Ruben Gonzalez, CPFA, Defined   Contribution Specialist, East Division,   Specialist Consulting Group, Janus   Henderson Investors  Stephanie Searles Vogel, Esq., Partner, Tax   and Employee Benefits, Partner,   Dilworth Paxson |
| Greater Pittsburgh  10/03/24 | Webinar: Maximizing Vendor Value: Strategies for Optimal Vendor Relationships | Dana Baker, M.B.A., Senior Director, Mayo   Clinic |
| Richmond  10/03/24 | In-Person: Employee Retirement Benefits: Investment Options, Secure 2.0 and Cybersecurity A Guide to Longevity: Hidden Cost of Aging | John Baron, AIF, Strange Wealth Advisory   Group  Eirc Van Der Hyde, CFP, RICP, ChFC, CLU,   Partner Concentric Wealth Partners |
| IS Chapter Webcast  10/8/24 | Webinar: DOL Developments for Retirement Plans | Steven Grieb, CEBS, Senior Compliance   Counsel, Gallagher |

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| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| Milwaukee  10/09/24 | Webinar: Why Weight? You Need to Know This Now! Drug Coverage & Other Weight Loss Program Considerations | Eileen Pincay, R.Ph., Senior Vice President  and National Pharmacy Practice Leader,   Segal Len Spangher, CEBS, MHP, Vice President   & Senior Consultant, Segal |
| Pacific Northwest  10/09/24 | Webinar: Terminated Vestd Participant Project (TYPP) | Tara, Causland, Benefits Advisor, US DOL   EBSA |
| New York Metro  10/16/24 | In-Person & Webinar: Artificial Intelligence (AI) and Your Organization | Michael Stoyanovich, CDPSE, Vice   President Administration and   Technology, Segal |
| British Columbia  10/17/24 | Webinar: Legal Update 2024 | Meghan Popp, Partner, Lawson Lundell |
| IS Chapter Webcast  10/17/24 | Webinar: CAM Navigating an Integrated Ecosystem of Healthcare Options | Colleen Kavanagh, CEO, SoulBeing |
| Greater Philadelphia  10/18/24 | In-Person: Summit 2024: HR Synergy: Integrating People, Technology, and Strategy (w/GVFHRA) | Speaker Panel |
| Southwestern Ontario and Toronto 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 |
| 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 |
| Greater Boston  10/24/24 | Webinar: Key Ingredients for Successful LTC Enrollments | Marc Glickman, CEO and Founder,   BuddyIns |
| Atlantic Canada  10/24/24 | In-Person: Education Session  - CAPS  - Menopause in the Workplace | Marc-Antonie Morin, Manulife  Catherine Biermann, Blue Cross |
| Detroit  10/24/24 | In-Person & Webinar: Fiduciary Responsibilities Recap | Stephanie Thwaites-Mattei, CEBS  Rhonda Van Tiflin, CEBS  Jonathon Trionfi, CEBS |
| Carolinas  10/29/24 | Webinar: Unlock the Power of Student Loan Repayment Benefits: Boost Your Recruitment and Retention with Student Loan Benefits | Beth Krasnow |
| 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 |
| 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 |
| Nebraska 11/12/24 | Webinar: The Evolution of Pharmacy What You Need to Know About Weight Loss Medications | Matt Jarvis, Vice President, Practice   Leader, Lockton Pharmacy Consulting |
| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| 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 |
| Carolinas  11/14/24 | Webinar: Emergency Savings Accounts | Ann Brisk, Senior Managing Director,   Strategy and Innovation, HSA Bank |
| Northern New Jersey  11/17/24 | Webinar: The Possible Legislative Impact of the Presidential Election | Gary Kline, Senior Principal, Federal   Government Affairs, Evernorth |
| Twin Cities  11/19/24 | In-Person: Mental Health Strategies for Yourself and Your Organization | Caitlyn Richey, Consultant, NFP |
| 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 |
| 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. |
| 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, Inc. |
| 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 |
| Detroit  12/10/24 | In-Person: Top 10 Health Benefit Trends of 2024 | Stephanie Thwaites-Mattei, CEBS |
| St. Louis  12/10/24 | Webinar: Post-Election Benefits Update | Bill Fegurson, Attorney, mercer |
| Georgia  12/18/24 | In-Person: Legal Updates |  |
| Pacific Northwest  01/08/25 | Webinar: COBRA | Tara Causland, Benefits Advisor, U.S.  Department of Labor, Employee   Benefits Security Administration (EBSA) |
| Chicago  01/15/25 | In-Person: Lifestyle Benefit Accounts (LSA) for 2025 | Sean Hughley |
| Tampa  01/15/25 | In-Person: Benefits Cybersecurity |  |
| Los Angeles  01/22/25 | In-Person: Legislative Update | Marilyn Monahan, Owner, Monahan Law  Office |
| Greater Boston 01/30/25 | Webinar: SECURE 2.0 |  |
| Dallas/Ft. Worth  02/13/25 | Webinar: 2025 Retirement Plan Roadmap: Legal Insights for the Year Ahead | Anne Meyer, Snell & Wilmer LLP  Jim Griffin, Snell & Wilmer LLP |
| 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 |
| Kansas City  02/13/25 | In-Person: Benefits Policy Agenda for 2025 | Jim Klein, President, American Benefits   Council |

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| **CHAPTER/DATE** | **PROGRAM** | **SPEAKERS** |
| 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 |
| Greater Philadelphia  02/19/25 | Webinar: Medicare Landscape 2025 | Tracy Keesey, CISR, President, Director of   Property & Casualty Operations, HTA   Insurance Services  Kathleen Bretzel, Director of Strategic   Relations, HTA Insurance Services |
| Northern California  02/25/25 | Webinar: Legal Update: Are you Ready for 2025? | Marilyn A. Monahan, Owner, Monahan   Law Office |
| IS Chapter Webcast  02/26/25 | Webinar: What you need to know about Roth | Lena Gionnette, Counsel, Nixon Peabody Eric Paley, Partner, Nixon Peabody |
| 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 |
| British Columbia  03/11-14/25 | Webinars (4): Fundamentals of Group Benefit & Pension Plans |  |
| Chicago  03/17/25 | Webinar: Shifting Health & Welfare Benefit Trends | Drew Rasmussen, CEBS, Mercer  Nancy Vick, CEBS, Mercer |
| Milwaukee 03/18/24 | In-Person/Virtual: Recent Retirement Plan Developments | Steven E. Grieb, Senior Compliance   Counsel, Arthur J. Gallagher & Co |
| 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 |
| Northern New Jersey  03/25/25 | Webinar: 39th Annual Mercer Survey Results | John Coleman, CEBS, Senior Principal,   Mercer  Paul Cimino, J.D., Mercer |
| IS Chapter Webcast  03/26/25 | Webinar: Fiduciary Process, Plan Design and Financial Wellness | Jamie Hayes, Senior Vice-President, NFP   Retirement Inc. |
| Dallas/Ft. Worth  03/24/25 | Webinar: Embrace Financial Strategies to Reduce Healthcare Costs | Chris Chan, Chief Value Officer, finHealth |
| IS Chapter Webcast  04/01/25 | Webinar: Lessons Learned from Implementing AI for HR Teams in 2025 | Kate Bernier, Co-founder and COO, Airbo  Vlad Gyster, Co-Founder and CEO, Airbo |
| 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 |
| Northern California  04/03/25 | Webinar: It's Time to Future Proof Your Pharmacy Benefit | Josh Golden, Senior Vice President,   Strategy, Capital Rx |
| British Columbia  04/08/25 | Webinar: Understanding and Nurturing Mental Health | Mike Mousseau, Mental Health Programs   & Business Development Manager,   GreenShield Health |
| Twin Cities  04/22/25 | In-Person: Beyond the Buzzwords: Crafting Benefits Communications that Resonate with your Workforce | CBIZ Panel |