IUPAT Professionals Forum

2027 CONFERENCE AGENDA

Saturday, February 6, 2027

3:00 - 5:00 p.m.	Registration
5:30-7:00	Reception

Sunday, February 7, 2027

8:30-9:30	Registration and Breakfast

9:30-10:45 **Keynote: How Labor is Meeting the Moment**

This session will address how labor can respond to emerging technology and workforce change through a worker-centered approach. Topics include:

- Artificial intelligence and its impact on workers
- Data centers, lobbying, and workforce agreements
- Training strategies that help labor meet changing workforce needs

11:00-12:00 **What's Happening in DC Post Midterms**

This session will review the post-midterm landscape in Washington, D.C., and what labor and benefit fund leaders should expect next.

- Midterm election results and implications
- Expected developments in Washington, D.C.
- Potential effects on labor and benefit fund priorities

12:00-1:00 Lunch

1:00-2:15 **CONCURRENT SESSIONS**

Capital Strategies

Examine current market conditions and timely investment issues affecting fund portfolios with discussion focused on:

- Market update
- Investment returns
- Investment hot topics and asset-allocation strategies across retirement, health, and apprenticeship funds

Cybersecurity Best Practices

Benefit funds maintain highly sensitive financial and personal information, making cybersecurity an essential component of fiduciary responsibility. Consider practical cybersecurity measures for fund offices, including risks created by artificial intelligence as you learn about:

- Ransomware prevention
- E-mail compromise and wire fraud
- Multi-factor authentication
- Vendor security assessments
- Cyber insurance considerations
- Incident response planning
- Protecting member information

2:30-3:30 **CONCURRENT SESSIONS**

The Role of Labor in Restructuring the Administrative State

This session will address how labor can play a role in influencing the Administrative State in the future.

Canadian Breakout Session: Open Forum

An open discussion of issues relevant to Canadian members on everything from fund operations and governance to investments and legislation. Bring your ideas and experience to contribute to the dialogue.

3:45-4:45 **CONCURRENT SESSIONS**

Collections: Modernizing Employer Contribution Compliance

As contribution reporting becomes increasingly digital, funds have new opportunities to improve accuracy, identify shortages sooner, and streamline collections. This session will address collections from the fund office perspective including:

- Electronic remittance reporting
- Third-party administrator coordination
- Payroll verification techniques
- Delinquency monitoring
- Employer reporting analytics
- Best practices for collections and compliance enforcement

DC Plan Provider Panel Discussion

Hear from defined contribution plan providers serving affiliates about how their plans operate with discussion focused on:

- Operating models used by affiliate plans
- Provider perspectives on plan administration
- Considerations for evaluating provider value

Monday, February 8, 2027

8:00-9:00 Breakfast

9:00-10:15 **Managing Risk in Benefit Plans**

This session will review strategies that can help plans understand and manage risk, including:

- Revisiting your Investment Policy Statement
- Asset allocation strategies
- Unique investment issues for Pension, Health and Apprenticeship Trust Fund Assets
- Labor Union General Treasury Funds

10:30-11:45 **CONCURRENT SESSIONS**

Health & Welfare Cost Containment

Learn strategies for controlling health and welfare plan costs while responding to high-cost therapies and provider arrangements:

- GLP-1 medications, injectables, and prescription drug costs
- Direct contracting with providers
- Health care cost-containment strategies

PLA Workshop

Work through project labor agreement issues with attorneys representing different geographic areas as they discuss:

- Jobs covered by project labor agreements
- Reciprocity and jurisdictional disputes
- Challenges to project labor agreements, including federal-government issues

11:45-1:00 Lunch

1:00-2:00 **CONCURRENT SESSIONS**

Apprenticeship Oversight

This session will focus on apprenticeship fund governance and program practices through both fiduciary and operational lenses:

- Regulatory and legislative issues to follow
- Fiduciary obligations
- Running the fund as a business
- Recruitment and retention best practices in apprenticeship programs

AI in Benefits

Explore practical governance and workforce considerations for using artificial intelligence. Topics for discussion include:

- How are various stakeholders using AI (Fund Office, Professionals, Members)
- What benefits and efficiencies are achieved with AI
- AI policies from drafting through enforcement
- Worker-centered implementation
- Training and technology considerations for the workforce

2:15-3:15 **CONCURRENT SESSIONS**

Payroll Audits

Examine payroll audits as a cross-disciplinary tool for identifying contribution and compliance issues.

- Coordination across professional disciplines
- Employer contribution compliance
- Compliance, settlement, and litigation case studies

LM Changes

This break out session will examine the final rule issued by the Department of Labor on the Labor-Management (LM) Labor Organization Annual Financial Reports that labor organizations are required to file under the Labor-Management Reporting and Disclosure Act of 1959 (LMRDA). Topics include:

- Updates forms
- New thresholds
- Filing timelines

3:30-4:30 **Labor Law Update**

This session will provide an update on labor law with a focus on:

- NLRB Activities
- Status of important relevant legal decisions
- OLMS Activities