

CEBS® ACADEMIC COSPONSOR



The *New*
CEBS.

Certified Employee Benefit Specialist® Program

2018

www.cebs.org

International Foundation 
OF EMPLOYEE BENEFIT PLANS
Education | Research | Leadership

The New CEBS.

The Certified Employee Benefit Specialist designation is a university-backed program that benefit pros use to demonstrate their knowledge. The curriculum is focused and dynamic. The delivery is engaging. And where you want to go? You're going to get there faster.

JOIN US ONLINE
CONNECT | DISCUSS
ASK | SHARE | LEARN



#CEBSProgram

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Important dates to consider in your planning:

- March 31, 2018** Exams on courses in the former program end.
- December 31, 2018** New course must be passed to retain credit for GBA and RPA courses transferred from the former program.

What's Your Benefits Story?

Through career twists and turns, you've managed to be the one with the right mix of skills to embrace this challenging field. You've shown an appetite for deciphering health and retirement plans, strong judgment, compassion for people and shrewd financial instincts. Now is the time to prove your mettle.

amplify.

You're a certifiable benefits pro, ready to tackle the tough stuff.
A strategic thinker. The go-to person when an obstacle needs crushing.
The new CEBS is quicker but more applicable. More convenient and more relational.

get real.

Having knowledge is key to professional success, but when you know how to apply that knowledge, you begin to soar. The new CEBS provides the education you need, delivered how you want it, and shows you how to put it into action.

elevate.

CEBS has kicked it up a notch. It's ready to meet you on your path to greatness with spot-on knowledge from an academic institution that is an eye-catcher on a resumé and a community of peers that you'll want to show off on your LinkedIn connections list.

Four letters that make a statement—past, present, future.
Your benefits story? It's just beginning.

CEBS.

How Does the New CEBS Help You?

The secret's out.

Employee benefits pros are having a tremendous impact on organizations. You want in on the action? Of course you do.

CEBS has always provided the university-caliber knowledge you need by partnering with the Wharton School of the University of Pennsylvania. Now you also get the application, the connections and the relationships, all career long.

Benefits Departments

(benefits managers, administrators, executives, generalists and specialists)

Use the CEBS program to build a team of bright professionals ready to hit the ground running. CEBS curriculum provides the application elements that allow you to apply your knowledge from day one. Arm yourself with the knowledge you need to ask advisors questions and confidently answer those you receive each day.

Sales Teams and Professional Services

(agents, brokers, producers, account managers, account execs, consultants, actuaries, attorneys, accountants, third-party administrators)

CEBS gives your organization a competitive edge with the “best-of-the-best” staff, resulting in increased business revenue and client retention. Ramp up your strategy with critical knowledge to put into action immediately and grow your business.

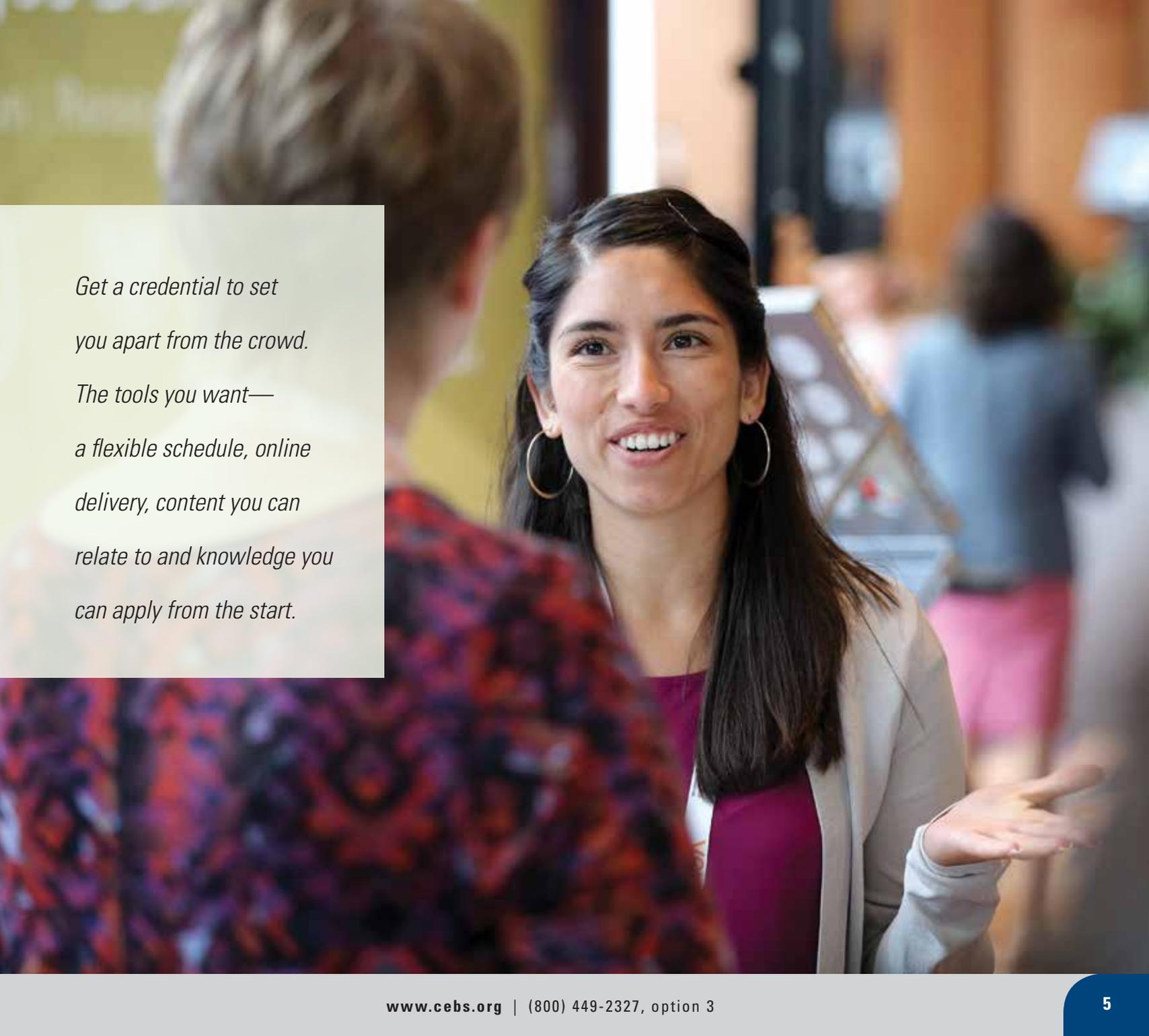
Employers Looking to Develop a Strong Benefits Team

The new CEBS will help you create a team of topnotch benefits professionals who know the ins and outs of benefits, ready to speak to the beneficiaries all the way up to the C-suite.

Credentials are a “must have” in today’s ever-changing business environment. The CEBS designation fits your employee development goals by providing relevant education and elevating your employees’ and your organizations’ stature in the benefits community

Request an Employer Tool Kit at www.cebs.org/employer-toolkit.

power up.



*Get a credential to set
you apart from the crowd.
The tools you want—
a flexible schedule, online
delivery, content you can
relate to and knowledge you
can apply from the start.*



What Do You Need to Succeed?

You want to see the future with the next step of advancement in arm's reach.

The new CEBS will get you there faster but without losing any of the oomph, the good stuff—knowledge, smarts, real skills. Streamlined core courses, laser-focused content, and less breadth and more depth mean now you can learn more in less time.

accelerate.

Get there faster. Jump into the new CEBS.

Your best CEBS journey depends on your experience and your learning style and may even vary from course to course. The new CEBS is designed to flex to fit you.

Required

Each course requires the successful completion of a two-hour comprehensive exam containing 100 multiple-choice questions.

Essential

Exams cover content from the Study Guide and textbook assigned to each course.

Study Guide

Exam material is based on the content presented in the Study Guide. Learning objectives detail the concepts covered and provide questions along the way for you to check your knowledge. Apply that knowledge with real-world case studies introduced throughout each Study Guide.

Textbook

A textbook and/or supplementary readings are required for each course, providing the theory and content of the topics covered in the Study Guide.

Additional support

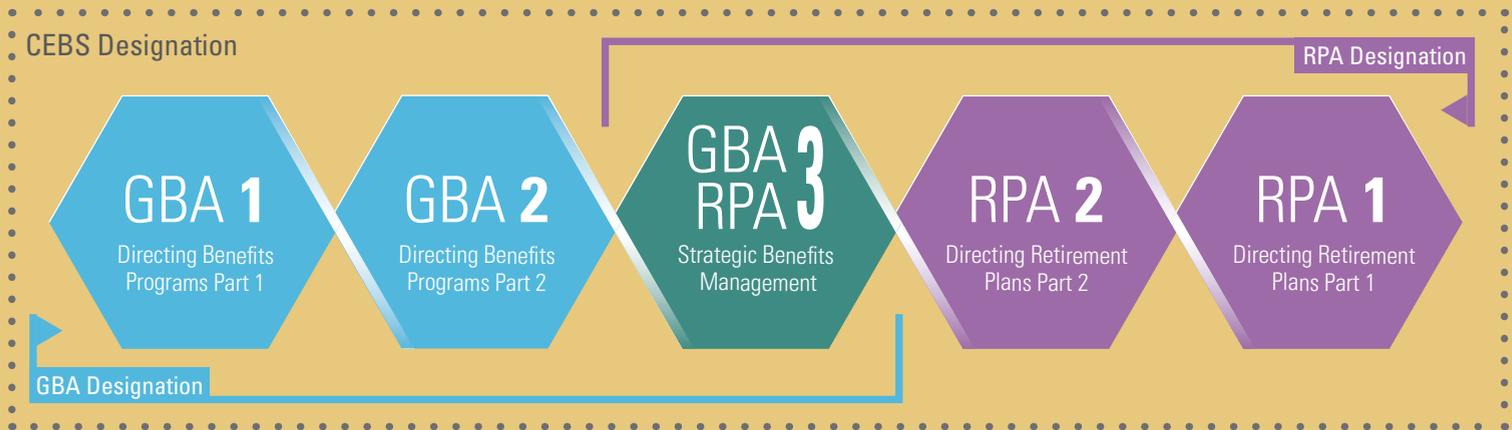
Instructor-Led Online Class

Need a little push to stay on track or the security of expert and peer support? Online classes are for you. Guided classes provide access to instructors, a structured time frame and peer interaction.

The Details of the Learning Experience

To earn your CEBS, you will successfully complete all five courses: GBA 1, GBA 2, RPA 1, RPA 2 and GBA/RPA 3. Earn your GBA or RPA designation by completing three courses described below.

It is recommended you start with GBA 1 or RPA 1. Complete all five and you will have an in-depth and well-rounded foundation of employee benefits.



Group Benefits Associate

For those dealing with health and other group benefits. The courses reflect up-to-date and relevant information—including the latest on health care reform—needed to effectively design, administer and communicate group benefits.

To earn the Group Benefits Associate designation, complete:

- GBA 1—Directing Benefits Programs Part 1
- GBA 2—Directing Benefits Programs Part 2
- GBA/RPA 3—Strategic Benefits Management.
(This course counts for credit toward the RPA designation.)

Retirement Plans Associate

For those who work with defined contribution and defined benefit plans or are involved with the management of plan assets. The courses reflect the most current and relevant information needed to effectively design and manage retirement plans.

To earn the Retirement Plans Associate designation, complete:

- RPA 1—Directing Retirement Plans Part 1
- RPA 2—Directing Retirement Plans Part 2
- GBA/RPA 3—Strategic Benefits Management.
(This course counts for credit toward the GBA designation.)

If you are a current student, see pages 28 and 29 for more details.

our time line.

Study Materials

CEBS study materials have been designed to prepare you for a successful exam, while providing knowledge you can put into action at work right away. Whether you select independent study or enroll in an instructor-led online class, you will need the following resources to prepare for your exam.

Study Guide

Each of the five courses has a Study Guide, created specifically to guide you through the content covered on that exam. You receive a print copy of the Study Guide and access to an online version with added digital features.

The guide is organized into modules, breaking the content down into digestible pieces. Several included features will help you organize your study and master the content.

- Outlined learning objectives and key concepts
- Content review questions with answers and page number references for the textbook
- Online access to all of the Study Guide materials
- Practice exam (online)
- Supplemental education and industry resources
- *Benefits in Action* and *Integrated Case Study* applications, which present a more complex scenario, drawing on themes and topics from multiple modules.

Putting concepts into action

Because the real world of benefits does not work in tidy theory, each Study Guide includes engaging case studies called *Benefits in Action*. These synopses provide day-to-day examples of how the concepts you are learning apply to your job responsibilities.

Each case study represents different plan sponsor environments, problems or scenarios. You have the opportunity to apply your knowledge (and gauge your understanding) as you determine the outcome or solution.

Textbook

An assigned textbook and/or supplementary readings for each course provide the theory and content for exploration and explanation of the topics covered in the Study Guide.

your path.

GBA 1

Directing Benefits Programs Part 1

The design and administration of relevant, highly valued employee benefits offerings are critical success factors in attracting and retaining global talent in today's competitive environment. GBA 1 highlights the many challenges and opportunities of offering and directing a portfolio of strategically designed health and welfare employee benefits programs. The course details wide-ranging issues in managing employee benefit risks and builds a foundational framework explaining the distinct benefit plans that comprise the health and welfare continuum. Alongside group health, dental, behavioral health and other plan types, the course examines legislative and regulatory trends, innovations in wellness and cutting-edge evaluation tools to equip today's benefits professional.

Topics covered in GBA 1

- Employee Benefits: The Environment
- Managing Employee Benefits Risks
- Group Health Plan Structures
- Consumer-Directed Health Plans
- Dental, Vision and Hearing Care Benefits
- Prescription Drug Plans
- Behavioral Health Care Benefits
- Workplace Wellness Programs
- Section 125 Plans
- Health Care Regulation
- Health-Related Evaluation Methods



Resources for GBA 1

<i>Required</i>	Successful completion of comprehensive exam	\$450
<i>Essential</i>	GBA 1 Study Guide, including online access to the modules and practice exam	\$225
<i>Essential</i>	<i>Employee Benefits Design and Compliance: Health and Welfare Plans</i> Mahoney and Maniaci, editors, XanEdu, Inc., 2017. ISBN 978-1-50-669745-1	\$155
<i>Supplementary</i>	Instructor-led online class <i>12-week session in spring, summer and fall</i>	\$220

For detailed information on continuing education credit related to this course, visit www.cebs.org/GBA1.

Putting benefits into action

Benefits in Action and the *Integrated Case Study* apply the concepts presented in the module to real situations encountered in a business environment. Learners will be asked questions faced in the real world, review real benefit plan documents and apply judgment based on information presented.

GBA 1 case study topics include:

- Benefits supporting strategic business results
- Explaining benefit differences
- Developing a wellness program
- Flex plans
- Prescription drug plan design and cost control.



GBA 2

Directing Benefits Programs Part 2

The course places particular emphasis on managing and directing employee benefit plans to maximize their strategic impact in achieving organizational objectives. Primarily focusing on health benefits issues, the course seeks to clarify the ever-changing dynamics of the U.S. health care system and endow today's benefits professional with the requisite skills and expertise to advance organizational objectives by enhancing benefits program design, pricing and operations. The initial modules probe financial and actuarial issues such as rating and premium setting, controlling risk and designing appropriate provider networks. The course also considers emerging marketplace innovations in care delivery platforms and quality improvement initiatives. Additionally, the latest thinking in benefit areas such as disability, long-term care and life insurance is presented.

Topics covered in GBA 2

- Changing Dynamics of the U.S. Health Care System
- Rating and Premium Setting
- Controlling Risk Factors
- Designing Cost-Effective Health Provider Networks
- Participant Response to Health Plan Pricing
- Initiatives in Health Care Quality Improvement
- Self-Funding by Small Employers
- Private Health Insurance Exchanges
- Patient-Centered Medical Homes
- Disability Income Programs
- Long-Term Care Insurance
- Life Insurance Concepts and Policy Options



Resources for GBA 2

<i>Required</i>	Successful completion of comprehensive exam	\$450
<i>Essential</i>	GBA 2 Study Guide, including online access to the modules and practice exam	\$225
<i>Essential</i>	<i>Employee Benefits Management and Financing</i> Mahoney and Maniaci, editors, XanEdu, Inc., 2017. ISBN 978-1-50-669740-6	\$90
<i>Supplementary</i>	Instructor-led online class <i>12-week session in spring, summer and fall</i>	\$220

For detailed information on continuing education credit related to this course, visit www.cebs.org/GBA2.

Putting benefits into action

Benefits in Action and the *Integrated Case Study* apply the concepts presented in the module to real situations encountered in a business environment. Learners will be asked questions faced in the real world, review real benefit plan documents and apply judgment based on information presented.

GBA 2 case study topics include:

- Benefits get personal
- Understanding the patient perspective
- Stop-loss mathematics: understanding the costs of lasering
- Systems thinking comes to benefits
- Employee benefits—balancing competing constraints.



GBA/RPA 3

Strategic Benefits Management

The course provides an overarching framework of today's most pressing and volatile issues that impact both health and welfare plans, as well as retirement and capital accumulation plans. The course begins by describing the contextual environment in which employee benefit plans operate. The overview surveys the fiduciary regulatory structure built on the foundation of ERISA and looks at the "community of expertise" that characterizes the many specialty services that comprise today's multifaceted benefits industry. The course then explores the myriad challenges confronting benefits professionals including compliance issues, cybersecurity and privacy, and overseeing plan audits. Managing vendor services within the realms of health care and retirement is also considered. How today's private benefit plans interact with social insurance programs and how they are deployed on a global scale are likewise detailed.

Topics covered in GBA/RPA 3

- ERISA Regulatory Framework
- Benefits Industry
- Plan Documentation Requirements
- Cybersecurity and Privacy Concerns
- Overseeing and Managing Plan Audits
- Issues in Vendor Management—Retirement
- Analytics and Vendor Management—Health
- Impact of Financial Product Innovation on Retirement Plans
- ERISA in Practice—Key Issues
- Social Insurance
- Health Care Coverage in Retirement
- Global Employee Benefits



Resources for GBA/RPA 3

<i>Required</i>	Successful completion of comprehensive exam	\$450
<i>Essential</i>	GBA/RPA 3 Study Guide, including online access to the modules and practice exam	\$225
<i>Essential</i>	<i>Strategic Benefits Management</i> Mahoney and Maniaci, editors, XanEdu, Inc., 2017. ISBN 978-1-50-669741-3.	\$185
<i>Supplementary</i>	Instructor-led online class <i>12-week session in spring, summer and fall</i>	\$220

For detailed information on continuing education credit related to this course, visit www.cebs.org/GBA-RPA3.

Putting benefits into action

Benefits in Action and the *Integrated Case Study* apply the concepts presented in the module to real situations encountered in a business environment. Learners will be asked questions faced in the real world, review real benefit plan documents and apply judgment based on information presented.

GBA/RPA 3 case study topics include:

- Auditing the auditor
- Adding investment products
- Drafting a severance agreement
- Explaining retiree health coverage.



RPA 1

Directing Retirement Plans Part 1

The course initiates a discussion of the strategic importance of retirement plan design in addressing an organization's need to systematically replenish its workforce, as well as in competitively rewarding its talent. The course provides context for understanding retirement plan design by outlining the defined contribution and defined benefit structures afforded preferential tax treatment as qualified plans. While providing a comprehensive overview of these structures, the course looks at which employer situations warrant use of various plan types and the compliance and operational issues that accompany use of these plans. In addition to commonly known plan types such as 401(k)s and profit-sharing plans, other specialty types of plans are introduced that are relevant for rewarding executive talent, nonprofit employees and governmental workers. Key plan issues such as fee transparency, legal risks and encouraging plan participation are also addressed.

Topics covered in RPA 1

- Private Retirement Plans: Background and Context
- Defined Contribution and Defined Benefit Structures
- Alternate Defined Benefit Approaches
- Overview of Defined Contribution Plan Structures
- Profit-Sharing and Money Purchase Pension Plans
- Foundations of 401(k) Plans
- Defined Contribution Practice Issues
- Special Purpose Plan Use
- Small Employer Retirement Plan Alternatives
- Individual Retirement Accounts (IRAs): Various Types and Multiple Uses
- Executive Retirement Arrangements
- Stock Compensation Plans



Resources for RPA 1

<i>Required</i>	Successful completion of comprehensive exam	\$450
<i>Essential</i>	RPA 1 Study Guide, including online access to the modules and practice exam	\$225
<i>Essential</i>	<i>Retirement Plans</i> 12th Edition Allen, Melone, Rosenbloom and Mahoney, editors, McGraw-Hill, 2017. ISBN: 978-1-259-72067-3 (Note: This text is also used in RPA 2.)	\$300
<i>Supplementary</i>	Instructor-led online class <i>12-week session in spring, summer and fall</i>	\$220

For detailed information on continuing education credit related to this course, visit www.cebs.org/RPA1.

Putting benefits into action

Benefits in Action and the *Integrated Case Study* apply the concepts presented in the module to real situations encountered in a business environment. Learners will be asked questions faced in the real world, review real benefit plan documents and apply judgment based on information presented.

RPA 1 case study topics include:

- Retaining key executives
- Selecting a small employer retirement plan
- Leaving a job
- Filing a section 83(b) election
- Retirement planning.



RPA 2

Directing Retirement Plans Part 2

The course provides strategic insights into today's most pressing challenges that accompany the sponsoring of defined contribution plans in a volatile, global world. From the outset, the course seeks to impart the fundamentals of investment management that should be mastered in order to effectively design, administer and monitor an array of investment choices within a retirement plan. Benefits professionals will find the information on investment principles compelling both from an institutional perspective in their role overseeing plans and on a personal level as empowering, assuming their plan allows participant investment direction. In addition to its coverage of investment topics, the course also reviews research findings from behavioral finance and how these findings can be relevant in plan design and administration. Plan governance and how wealth can be enhanced through prudent retirement plan distribution planning are also topics covered by the course.

Topics covered in RPA 2

- Retirement Plan Investing
- Balancing Risk and Return
- Portfolio Management Issues
- Investment Managers and Plan Intermediaries
- Active and Passive Investment Strategies
- Insights From Behavioral Finance
- Target-Date and Lifecycle Funds
- Hybrid Retirement Plan Approaches
- Plan Sponsor Administrative Responsibilities
- Participant Services
- Fiduciary Oversight and Plan Governance
- Distribution Planning and Wealth Management



Resources for RPA 2

<i>Required</i>	Successful completion of comprehensive exam <i>Exam opens April 15, 2018</i>	\$450
<i>Essential</i>	RPA 2 Study Guide, including online access to the modules and practice exam <i>Available early 2018</i>	\$225
<i>Essential</i>	<i>Retirement Plans</i> 12th Edition Allen, Melone, Rosenbloom and Mahoney, editors, McGraw-Hill, 2017. ISBN: 978-1-259-72067-3 (Note: This text is also used in RPA 1.)	\$300
	<i>Retirement Plan Investing Essentials</i> Mahoney and Maniaci, editors, XanEdu, Inc., 2018. ISBN: 978-1-50-669860-1	\$150
<i>Supplementary</i>	Instructor-led online class <i>12-week session in summer and fall</i>	\$220

For detailed information on continuing education credit related to this course, visit www.cebs.org/RPA2.

Putting benefits into action

Benefits in Action and the *Integrated Case Study* apply the concepts presented in the module to real situations encountered in a business environment. Learners will be asked questions faced in the real world, review real benefit plan documents and apply judgment based on information presented.

RPA 2 case study topics are currently under development. Watch for more details in early 2018.

How to Apply for the Examination

Now that you've selected a course, keep yourself motivated by choosing your exam quarter. Use the online form at www.cebs.org, or use the order form in this catalog. Select the testing quarter that best meets your business, personal and study schedules. If you are enrolled in the instructor-led online class, it is recommended that you choose an exam quarter that allows you to complete the class with adequate time to review. Choosing a testing quarter establishes your exam eligibility as shown below. Computer-based exams are available at Prometric testing centers throughout the United States and provide immediate results.

How to schedule your exam

Once you have submitted the exam application and fee and received a confirmation letter, you can make your exam appointment during your chosen testing quarter at the Prometric testing center of your choice.

Testing quarters

January 1-March 31

April 1-June 30

July 1-September 30

October 1-December 31

Please refer to www.cebs.org for scheduling procedures.

Exams

Testing is open for GBA 1, GBA 2, GBA/RPA 3 and RPA 1. Testing for RPA 2 opens April 15, 2018.

Fees

Exam Transfer	\$95
Exam Retake	\$95





Study Options

learn.

A full portfolio of study tools will set you up for success. Consider your professional and educational experience with the content of each course—You may need more support for some courses and less for others. You'll find a path that fits your needs for each course.

Independent study

CEBS courses are designed for independent study to prepare for the examination. You can create your own study schedule to accommodate your business and personal obligations.

Instructor-led online class

Online CEBS classes are an optional educational tool designed to complement the self-study approach. Offered over a 12-week period during the spring, summer and fall, online classes give structure to your study and are taught by established and experienced CEBS professionals.

With an online class, you get:

- Instructor notes
- Audio overview of each module
- Quizzes, interactive games, discussion and activities based on the *Benefits in Action* cases
- Live review sessions
- Opportunity to ask questions and network with others in the class.

The class is available 24/7 online, giving you the flexibility to study wherever and whenever you need to.

How to enroll in an online class

Submit the enrollment form found at www.cebs.org along with the online class fee. You must be enrolled in the corresponding exam in order to participate in the online class. Order your Study Guide and textbook to use throughout the online course. Choose an exam quarter that will give you ample time to study during the online class and to review after the class concludes.

Visit www.cebs.org/onlineclass for the online class schedule.

CEBS Conferment Ceremony and Symposium

CEBS Conferment Ceremony

Shout it from the rooftops! You've earned your designation.

The annual Conferment Ceremony honors new CEBS graduates, as well as new GBA and RPA designees. It's your opportunity to be publicly applauded for your academic achievements and formally ushered into the community of benefits professionals.

At the conferment, you'll be welcomed by many who have shaped the CEBS program and the benefits profession. You'll walk across the stage and be personally congratulated by International Foundation leaders and the Wharton School academic team.

The Conferment Ceremony offers a formality that honors the significance of your accomplishment. Transition to the Conferment Reception, immediately following, for a celebration with your CEBS peers, eager to congratulate the new graduates and designees who join their ranks.

Learn more at www.cebs.org/conferment.

Set your completion goals and start picturing your conferment!

As you prepare your study plan, set a goal for your favorite city on the list to celebrate and reward yourself, learn and connect with other graduates and enjoy a world-class conference.

CEBS Conferment Ceremony and Employee Benefits Symposium

August 26, 2018
The Westin Copley Place Boston
Boston, Massachusetts
Symposium: August 26-29

September 8, 2019
Hyatt Regency New Orleans
New Orleans, Louisiana
Symposium: September 8-11

August 23, 2020
Hilton San Diego Bayfront
San Diego, California
Symposium: August 23-26

September 19, 2021
Hilton Minneapolis
Minneapolis, Minnesota
Symposium: September 19-22

August 7, 2022
Sheraton Centre Toronto Hotel
Toronto, Ontario
Symposium: August 7-10

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ISCEBS Employee Benefits Symposium

Come to celebrate your achievement.

Stay to advance your professional prominence, your industry relationships, the benefits profession.

The people

The Employee Benefits Symposium is a secret club of sorts. Here, you'll find your people. They speak your language. They'll understand why you get excited over the latest benefits legislation. They'll love to hear your stories and have a few of their own to share with you.

The education

The meat, the substance you crave—The Symposium packs 2½ days with solution-oriented sessions, case studies and strategic topics. Choose from health, retirement, employee engagement and retention and, of course, compliance topics.

The venue

The Employee Benefits Symposium is held at varying locations across the United States and Canada. Locations chosen offer the best blend of travel ease, premier meeting and guest room offerings, and local entertainment opportunities for your down time.



gnized.

Join the International Society of Certified Employee Benefit Specialists (ISCEBS)

As an organization serving the ongoing education needs of CEBS graduates and students, ISCEBS brings together benefits professionals who are among the best and brightest in the industry. Connect with other graduates and students, and get involved in your local chapter to grow your professional network.

Society members share a common goal to deliver the best service to plan participants by staying abreast of legislative and legal requirements, industry trends and the needs of an evolving workforce.

The Society offers educational and networking resources at national and local levels. Meet local professionals at one of the Society's chapters, or from across Canada and the United States at the annual Employee Benefits Symposium. Society and chapter membership is open to those who have passed at least one exam.

Benefits professionals represent a wide range of specialties, industries and roles. Why not tap into that experience to support your studies and help you meet your professional goals?

What's in it for you?

- **ISCEBSLink**—an online community where you can ask questions, get insights and share documents
- **Unlimited Webcasts**—timely updates on emerging trends and compliance issues. Available live or on demand.
- **Legislative Tracker/Scorecard**—a listing of recently proposed and enacted legislative bills related to employee benefits
- **Local Chapters**—provide local education and networking opportunities.
- **Information Center**—unlimited access to the most complete collection of resource and reference materials available anywhere. A staff of information specialists provides personalized research relevant to your specific questions.
- **Employee Benefits Symposium**—a comprehensive 2½-day program with timely and relevant topics focused on health, retirement and global issues and with a special track devoted to Canadian benefits issues. See page 23 for more information. Special rates for members and new graduates.

Visit www.iscebs.org to learn more about membership and this community of benefit professionals.



The International Foundation of Employee Benefit Plans is privileged to partner with the Wharton School of the University of Pennsylvania in offering the CEBS program.

About the International Foundation

The International Foundation of Employee Benefit Plans—a nonprofit educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information—established the CEBS program in 1977.

About the Wharton School

Founded in 1881 as the first collegiate business school, the Wharton School is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. The most comprehensive source of business knowledge in the world, Wharton bridges research and practice through its broad engagement with the global business community.



CEBS Continuing Professional Education (CPE) Requirement



Fuel your fire for knowledge by continuing to learn the latest in employee benefits.

Once you've earned your CEBS designation, validate your ongoing industry commitment. CPE compliance sets you apart as a committed, knowledgeable professional dedicated to lifelong learning. The CPE program is beneficial for all CEBS designees from recent graduates to longtime designation holders at every level of their career.

Stay CEBS CPE-compliant by earning a minimum of 30 hours of CPE credit for each two-year period. Earn the required credit hours, and you will be listed and recognized on www.cebscpe.org in a publicly available and searchable listing of all graduates whose CPE compliance is current.

Visit www.cebscpe.org for more information on eligible activities, reporting guidelines and policies.





Continuing Education Credit (CE)

Licensing and other professional credit

Participation in the CEBS program may help you meet your continuing professional education and licensing requirements. CEBS courses have been accepted in many states as continuing education credit for insurance agents and other professions.

Credit hours and filing procedures vary by discipline and from state to state. Information for each state is available on our website at www.cebs.org, or contact the CE Department for a summary of state approvals and reporting procedures.

For additional CE information, visit www.cebs.org/CE.

GI Bill

CEBS exam fees have been approved for reimbursement through the U.S. Department of Veterans Affairs. Visit www.gibill.va.gov for additional information.

Questions and requests on continuing education credit
E-mail: continuinged@ifebp.org
Call: (262) 786-6710, option 3

Next Steps for Current Students

What exam credit will transfer to the new CEBS?

Have you already passed one or more exams in the former curriculum?
Keep the momentum going!

All students who have passed GBA 1, GBA 2, RPA 1 and/or RPA 2 will be given credit for these courses in the new tracks. All other CEBS courses are no longer part of the redesigned CEBS model. In order to earn your CEBS credential, you can complete courses in the former program, or you can choose to take courses in the new program.

Keep in mind these important points as you make your next move:

- If you have credit (pass grade) for GBA 1 and GBA 2, you can earn your GBA designation by completing the GBA/RPA 3 course in the new curriculum.
- If you have credit for RPA 1 and RPA 2, you can earn your RPA designation by completing the GBA/RPA 3 course in the new curriculum.
- If you elect to finish your GBA, RPA or both under the former curriculum, you will still need to take GBA/RPA 3 if you want to complete your CEBS under the new CEBS model.
- Testing on courses in the former program will end on **March 31, 2018**.
- To retain credit (pass grade) for any of the GBA and RPA courses transferred into the new track, **you will need to pass any course in the new track by December 31, 2018**. After that time, if you have not completed your CEBS designation or a course in the new track, credit for any courses completed in the former curriculum will expire and will no longer count toward completion of a course in the new CEBS program.

Questions about your next step? Give us a call at (800) 449-2327, option 3, or e-mail cebs@ifebp.org. Detailed information on the former curriculum is also available at www.cebs.org/cebsformer or on the new curriculum at www.cebs.org.

go forward.

Completed courses that apply to the new program.

Former Curriculum Courses

New Curriculum Courses

Five Required Courses for CEBS

	GBA	RPA	CEBS			GBA	RPA	CEBS
GBA 1 Group Health Plan Design	✓		✓	➔	GBA 1 Directing Benefits Programs Part 1	✓		✓
GBA 2 Group Benefits Management	✓		✓	➔	GBA 2 Directing Benefits Programs Part 2	✓		✓
RPA 1 Retirement Plan Design		✓	✓	➔	RPA 1 Directing Retirement Plans Part 1		✓	✓
RPA 2 Retirement Plan Management		✓	✓	➔	RPA 2 Directing Retirement Plans Part 2		✓	✓
					GBA/RPA3 Strategic Benefits Management	✓	✓	✓

If you earned your GBA, RPA or CMS in the former curriculum, you retain all the rights and privileges to use these credentials.

Important dates to consider in your planning:

March 31, 2018

Exams on courses in the former program end.

December 31, 2018

New course must be passed to retain credit for GBA and RPA courses transferred from the former program.

Principles of Conduct

In order to support the basic objectives of high levels of competence, performance and ethical conduct, all persons who seek or obtain the CEBS designation are expected to comply with the letter and spirit of these Principles of Conduct.

Principle 1: In all professional, business or fiduciary relationships, a CEBS shall act with honor and integrity in dealings with the public, plan participants, employers, clients and other professionals.

Principle 2: A CEBS shall continually strive to maintain and improve the knowledge, skills and competence needed for effective performance in the profession. This not only includes the initial acquisition of professional knowledge and skills but also requires continued learning and development.

Principle 3: When serving an employee benefits plan, whether in a fiduciary capacity or otherwise, a CEBS shall apply care, skill, prudence and diligence in accordance with the “prudent person rule.”

Principle 4: A CEBS shall not allow the pursuit of financial gain or other personal benefit to interfere with the best interests of plan participants, beneficiaries, employers and clients.

Principle 5: In business, professional or fiduciary activities, a CEBS shall avoid any activity or conduct that constitutes a dishonest, deceitful, fraudulent or knowingly illegal act.

Principle 6: A CEBS shall maintain knowledge of and comply with the enforcement of laws, regulations and codes that foster the highest level of competence, performance and ethical conduct as it pertains to employee benefits plans.

Principle 7: A CEBS shall respect confidential relationships that may arise in business or professional activities.

Principle 8: A CEBS shall honor the integrity and respect the limitations placed on the use of the CEBS designation.

Principle 9: A CEBS shall only recommend for CEBS candidacy those individuals known by the member who engage in practices that conform with the Principles of Conduct.

Visit www.cebs.org/precert to read the Precertification Standards.

CEBS, Inc.

Certified Employee Benefit Specialist, Inc. (CEBS, Inc.) is a wholly owned subsidiary of the International Foundation, a tax-exempt business association. CEBS, Inc., is responsible for granting the CEBS designation and is solely responsible for the promotion of that designation.

CEBS Pledge

As a Certified Employee Benefit Specialist, I pledge to abide by the CEBS Principles of Conduct in all my fiduciary, business and professional relationships, and to participate only in activities that conform with the spirit of those principles; I shall strive at all times to maintain and uphold the highest standards of honor and integrity, so that the quality of my work will reflect credit on the CEBS designation, my profession and the employee benefits field.





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