Pensions on Peachtree – Atlanta, GA – April 16-17, 2015

AGENDA
Thursday, April 16

8:00 - 8:30 a.m.	Registration and Continental Breakfast

General Session

8:30 - 10:10 a.m. — **Keeping Current – Ferenczy, Watson –** Derrin and Ilene review and explain the changes in the retirement plan world in the last year, with a focus on issues not otherwise covered at the conference. Congress. IRS. DOL. PBGC. Courts. It's all there in Keeping Current.

10:10 - 10:30 a.m. — Refreshment Break

Concurrent Sessions 10:30 a.m. - 5:00 p.m. – Attend **one** topic from each group below.

Grp 1: 10:30 - 11:45

1- The Ins and Outs of Plan Amendments – Cohen, Richter
- What exactly is a plan amendment and why are they done?
- Timing issues and avoiding cut-backs
- IRC vs. ERISA
- Mid-year amendments to Safe Harbor plans
- Best practices

2- Makeover Your Takeover – Farmer
- Techniques to guide your new relationship
- Uncovering the good, the bad, and the ugly
- Developing a plan of action in calm seas and rough waters
- Transition and implementation strategies to build a good foundation
- Case studies that put your skills to the test

11:45 - 1:00 p.m. — Hosted Luncheon

Grp 2: 1:00 - 2:15

3- The Ins and Outs of After-tax Contributions – Watson
- Limitations
- Testing
- New strategies; old problems
- Distributions

4- How to Turn Benefits M&A from M&Ayhem into M&Agnificent – Cohen, Farmer, Ferenczy
- Transaction basics: what you need to know before you start analyzing the plan
- Who's the sponsor, who are the participants, and what's the transition period everyone talks about?
- Merging or spinning off plans after the transaction: a practical guide
- Unanswered questions and what to do about them
- Strategies for getting clients to think about pension issues before they become problems

Grp 3: 2:25 - 3:40

5- The Keys to Effective Communications with Clients and Staff – Schultz
- Identify common communication pitfalls that can undermine your message
- Learn strategies to effectively communicate complex issues

- Techniques to add to your influence as a business leader and relationship manager

6- Plan Provisions That Should Come with a Surgeon General's Warning – Farmer, Richter

There are plan provisions that complicate administration and should be avoided.
PPA restatements are a good opportunity to review and change problematic provisions.

- Problematic eligibility provisions
- Compensation – trying to match the data
- Short plan years
- Mandatory cash-outs

3:40 - 4:00 p.m. Refreshment Break

Grp 4: 4:00 - 5:00 **7- Lost Participants: New Perspectives on an Old Problem – Watson**

- New DOL guidance
- Fiduciary issues beyond plan termination
- Plan document strategies
- Dealing with unusual situations

8- Sandbox Synergies: How TPAs, Advisors, CPAs, and Lawyers Can Work Together Productively – Schultz

- Understand the characteristics and needs unique to each profession
- Review strategies to work together to maximize networking, sales, and client service opportunities
- Identify the efficiencies and synergies created by quality professional relationships

6:30 p.m. Barbeque at Ilene's Home – cocktails at 6:30 p.m., dinner will be served at 7:00 p.m. Please RSVP on the registration form. Transportation will be provided.

Friday, April 17

8:00 - 8:30 a.m. Continental Breakfast

General Sessions

8:30 - 10:10 a.m. **The Real EPCRS – Cohen, Farmer, Ferenczy –** Let the pros at the Ferenczy Benefits Law Center show you from beginning to end how to handle real life corrections under the IRS correction program, EPCRS. This interactive session will give you the practical tools you need to help employers maintain the qualified status of their plans.

10:10 - 10:30 a.m. Refreshment Break

10:30 - 12:10 p.m. **The Nitty Gritty of Plan Design – Richter, Schultz, Watson –** So many issues and choice impact effective plan design. In this interactive session, the attorneys from SunGard demonstrate the process of effective plan design: from information gathering to plan selection; from eligibility to vesting and distributions; from allocations to forfeiture.

12:10 - 1:20 p.m. Hosted Luncheon

1:20 - 2:35 p.m. **Ask the Oracles – Panel –** Bring your tough questions. Our panel will take them on in this session, which sometimes shows there's more than one side to many stories.

2:35 - 2:50 p.m. Refreshment Break

2:50 - 4:30 p.m. **Ethics and Professional Responsibility – Ferenczy, Watson –** Derrin and Ilene close the conference with a look at the recent changes to IRS practitioner requirements, coupled with fun (yes, really!) and interactive case studies showing how the rules apply to daily practice. Join the conversation!

4:30 p.m. Adjourn