

Advanced Pension Conference

Chicago, IL – September 7-9, 2016

Westin Michigan Avenue Hotel

Empowering
the Financial World



Agenda

Wednesday, September 7

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

General Session

8:30 - 8:45 a.m. **Welcome and Announcements** – Watson

8:45 - 10:25 a.m. **Keeping Current** – Ferenczy, Watson
Join Ilene and Derrin for an entertaining session that highlights the latest guidance from Congress, the IRS, the DOL, and the courts. Emphasis is given to areas not covered elsewhere in the program.

10:25 - 10:45 a.m. Refreshment Break

10:45 - 12:00 p.m. **Exploring Mid-year Safe Harbor Amendments** – Pratt, Watson
IRS guidance this year opened the doors for midyear amendments to safe harbor plans, but include several important limitations and conditions. Come for an in-depth discussion of the new rules and an opportunity to try your own hand in a variety of situations.

12:00 - 1:15 p.m. Hosted Luncheon

1:15 - 2:45 p.m. **They're here! The New Fiduciary Regulations** – Ferenczy, Schultz
The IRS gave us over 1,000 pages of rules and commentary destined to remake many elements of retirement plan practice in the 21st century. You'll hear an in-depth discussion of what the new rules and exemptions mean for you and those you work with.

2:45 - 3:00 p.m. Refreshment Break

3:00 - 4:00 p.m. **The Future of Plan Documents** – Richter, Watson
In ending the determination letter program for individually designed plans (other than on adoption and termination), the IRS has changed the landscape for preapproved plans as well. This session focuses on the nitty gritty of dealing with all kinds of plan documents under the newly announced rules.

4:15 - 5:15 p.m. **Pension Jeopardy** – Panel
Join Derrin as he hosts our version of the popular game show. Topical questions test the knowledge of our expert speakers. This session is not only fun, but also highlights important pension issues in a memorable way.

5:15 p.m. Cocktail Reception

Thursday, September 8

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

Concurrent Sessions 8:30 a.m. - 5:00 p.m. – Group I sessions are 60 minutes each. Group II sessions are 75 minutes each. Attend **two** topics from Group I and **two** from Group II.

GROUP I: 8:30 - 9:30 a.m. and repeated 9:40 - 10:40 a.m.

01. Negotiating with the Government – Ferenczy

02. Affiliated Service Groups: A Deep Dive – Watson

03. How the New Fiduciary Rules Affect TPAs – Schultz

10:40 - 10:55 a.m. Refreshment Break

GROUP II - Part 1: 10:55 - 12:10 p.m. and *repeated after lunch* 1:20 - 2:35 p.m.

04. Multiple Employer Plans: Is Their Time Finally Coming? – Pratt**05. Just the FAQs: The Top Questions from Our Customers – Schultz****06. Benefits, Rights, and Features: Identifying, Testing, Correcting – Richter**

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

GROUP II - Part 2: 1:20 - 2:35 p.m. See above for Group II session descriptions.

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

GROUP III: 2:50 - 3:50 p.m. Sessions are 60 minutes each. Attend **one** topic from this group.

07. Give It Up For Forfeitures – Schultz**08. Courting the Regs: Lawsuits to Stop the Fiduciary Rules – Pratt****09. 403(b) Pre-approved Plans: What's next? – Watson**

GROUP IV: 4:00 - 5:00 p.m. Sessions are 60 minutes each. Attend **one** topic from this group.

10. Current Topics in Mergers and Acquisitions – Ferenczy**11. Government and Church Plans – Pratt****12. Self-employment Income: Beyond the Basics – Watson****Friday, September 9**

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

General Session

8:30 - 8:35 a.m. **Announcements – Watson**

8:35 - 10:05 a.m. **Washington Update – Richter**
A fast paced review of activity in Congress, the White House, and executive agencies dealing with retirement plans and tax reform.

10:05 - 10:25 a.m. Refreshment Break

10:25 - 12:00 p.m. **Ask the Experts Workshop – Panel**
Get those tough questions answered. Case studies will be used in a discussion of the issues currently facing practitioners in employee benefits area.

12:00 p.m. Adjourn

Continuing Education Credits – Total possible hours: 960 Minutes ÷ 50 = 19 CPE/CE hrs.*
 960 Minutes ÷ 60 = 16 CE hrs.*

*Final decision rests with governing body. Program may qualify for partial credits by some governing bodies.