

# Advanced Pension Conference

February 1-3, 2017 • Orlando, FL  
Hard Rock Hotel at Universal Orlando

Empowering  
the Financial World



## Agenda

### Wednesday, February 1

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

#### General Session

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

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. **Future of the Form 5500** – Watson

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

1:15 - 2:15 p.m. **Roll It On Over: An Overview of Rollovers** – Watson

2:15 - 2:30 p.m. Refreshment Break

2:30 - 4:00 p.m. **Final Fiduciary Regulations** – Ferenczy, Schultz, Watson

4:15 - 5:15 p.m. **Q&As on Final Fiduciary Regulations** – Ferenczy, Schultz, Watson

5:15 p.m. Cocktail Reception

### Thursday, February 2

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. Advanced Hardships and Loans** – Schultz

**02. Plan Governance Overview** – Ferenczy

**03. Electronic Consent and Disclosure** – Richter

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. Ins-and-Outs of Amendments** – Richter

**05. Cross-testing: A Case Study** – Mayo

**06. The Genesis of Guidance** – Hoffman

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. Auto-enrollment and Auto-escalation** – Richter

**08. Plan Mergers and Acquisitions** – Mayo

**09. MEPs and PEPs: An Update on Multiple Employer Plans** – Hoffman

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

**10. Compensation - Different Definitions and Why They Matter** – Schultz

**11. Best Practices for Handling Participant Claims and Inquiries** – Mayo

**12. Radical Mid-Year Changes to Safe Harbor Plans** – Ferenczy, Watson

## Friday, February 3

8:00 - 8:25 a.m. Continental Breakfast

### General Session

8:25 - 8:30 a.m. **Announcements**

8:30 - 9:30 a.m. **Washington Update** – Hoffman

9:30 - 9:50 a.m. Refreshment Break

9:50 - 10:50 a.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.

11:00 - 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:  $955 \text{ Minutes} \div 50 = 19 \text{ CPE/CE hrs.}^*$   
 $955 \text{ Minutes} \div 60 = 15.5 \text{ CE hrs.}^*$

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