

Advanced Pension Conference

Chicago, IL – September 7-9, 2016

Westin Michigan Avenue Hotel

Empowering
the Financial World



Agenda

Tuesday, September 6

5:00 - 6:00 p.m. Early Registration and Refreshments - Superior East, 2nd floor

Wednesday, September 7

8:00 - 8:30 a.m. Registration/Continental Breakfast Michigan III
General Session 8:30 a.m. - 5:15 p.m. Michigan I - II
8:30 - 8:45 a.m. **Welcome and Announcements** – Watson
8:45 - 10:25 a.m. **Keeping Current** – Ferenczy, Watson
10:25 - 10:45 a.m. Refreshment Break Michigan III
10:45 - 12:00 p.m. **Mid-year Safe Harbor Amendments** – Pratt, Watson
12:00 - 1:15 p.m. Hosted Luncheon Great Lakes I
12:00 - 1:15 p.m. Relius Solutions User Grp. Meeting Ontario/Erie
1:15 - 2:45 p.m. **The New Fiduciary Regulations** – Ferenczy, Schultz
2:45 - 3:00 p.m. Refreshment Break Michigan III
3:00 - 4:00 p.m. **The Future of Plan Documents** – Richter, Watson
4:15 - 5:15 p.m. **Pension Jeopardy** – Panel
5:15 Cocktail Reception Michigan III

Thursday, September 8

8:00 - 8:30 a.m. Continental Breakfast Michigan III
Concurrent Sessions 8:30 a.m. - 5:00 p.m.
GROUP I: 8:30 - 9:30 a.m. and repeated 9:40 - 10:40 a.m. Pick **two** topics.
 01. Negotiating with the Government – Ferenczy Huron ABC
 02. Affiliated Service Groups – Watson Michigan I-II
 03. How New Fiduciary Rules Affect TPAs – Schultz Ontario/Erie
10:40 - 10:55 a.m. Refreshment Break Michigan III
GROUP II - Part 1: 10:55 - 12:10 p.m. and *repeated after lunch*. Pick **two** topics.
 04. Multiple Employer Plans – Pratt Huron ABC
 05. FAQs: Top Questions from Customers – Schultz Ontario/Erie
 06. Benefits, Rights, and Features – Richter Michigan I-II
12:10 - 1:20 p.m. Hosted Luncheon Great Lakes I
GROUP II - Part 2: 1:20 - 2:35 p.m. See above for sessions and meeting rooms.
2:35 - 2:50 p.m. Refreshment Break Michigan III
GROUP III: 2:50 - 3:50 p.m. Pick **one** topic.
 07. Give It Up for Forfeitures – Schultz Ontario/Erie
 08. Lawsuits to Stop the Fiduciary Rules – Pratt Huron ABC
 09. 403(b) Pre-approved Plans – Watson Michigan I-II
GROUP IV: 4:00 - 5:00 p.m. Pick **one** topic.
 10. Mergers and Acquisitions – Ferenczy Ontario/Erie
 11. Government and Church Plans – Pratt Huron ABC
 12. Self-employment Income – Watson Michigan I-II

Friday, September 9

8:00 - 8:30 a.m. Continental Breakfast Michigan III
General Session 8:30 a.m. - 12:00 p.m. Michigan I - II
8:30 - 8:35 a.m. **Announcements** – Watson
8:35 - 10:05 a.m. **Washington Update** – Richter
10:05 - 10:25 a.m. Refreshment Break Michigan III
10:25 - 12:00 p.m. **Ask the Experts Workshop** – Panel