

Benefits Conferences

List of Topics and IRS/Treasury Speakers Involved
as of 04/29/09

Completed Benefits Conferences

	Great Lakes Benefits Conference	Los Angeles Benefits Conference	Benefits Conference of the South	SWBA/IRS 19th Annual Employee Benefits Conference	21st Annual Cincinnati Employee Benefits Conference	Northeast Benefits Conference	Mid-Atlantic Benefits Conference
Web site link for further information	2009 GLBC	2009 LABC	2009 BCOS	2008 SWBA	2008 CEBC	2008 NEBC	2008 MABC
Dates	4/20/09 - 4/21/09	1/28/09 - 1/30/09	1/15/09 - 1/16/09	11/20/08 - 11/21/08	6/12/08 - 6/13/08	6/12/08 - 6/13/08	5/22/08 - 5/23/08
Location	Chicago, IL	Los Angeles, CA	Atlanta, GA	Dallas, TX	Cincinnati, OH	Boston, MA and New York, NY	Washington, DC
Topic/Speaker							
	IRS Legislative and Regulatory Update Pippins	Washington Update Zuckerman	IRS Update Zuckerman, Kahn, Bellanger, Holland	National Office Update: Rulings and Agreements Zuckerman	Determinations and Examinations Update Zuckerman, Jones	Washington DC Update Templeman	Employee Plans Priorities and Direction Julianelle
	EPCRS Update/Case Studies Christenson, Dorevitch, Mitchell	EPCRS Changes and Case Studies with a Little VFCP Thrown in on the Side Bhagat	IRS and DOL Correction Programs Kahn	Meet the New EPCRS....Same as the Old EPCRS? Ruprecht		Update on EPCRS - Correcting Common Errors in DB and DC Plans Feldman, Holland	EPCRS Update: The Latest News from the Correction Programs Kahn, O'Donnell
	Defined Benefit Funding After PPA Milling, Pippins	IRS and DOL Examinations: The Sky Is Not Falling - Yet Templeman	Case Studies using IRS and DOL Correction Programs Kahn	Retirement Plan Examinations Templeman, Bellanger			Examinations Update & Navigating the IRS Web Site Templeman, Thomas
	IRS Audit/Critical Priorities Update Gore, Templeman	IRS Employee Plans Examination and Enforcement Templeman, Patton					
				457(b) and 457(f) Plan Issues Architect			
		Actuarial Session Holland	Plan Documents in 2009 Kieffer		Pre-Approved Plans Atlas, Noe	Defined Contribution Plan Design and Operation Under PPA Migdail	Rulings & Agreements Update Holland, Zuckerman
				The Automatic Retirement Plan: Guidance Updates Pippins		PPA Update on Defined Benefit Plans - Part I Holland	Auto Enrollment - Keeping Your Eyes on the Plan and Your Hands on the Rules to Avoid a Qualification Disaster Migdail
	ERPA, "I Want You!" Burlison, Lohning, Templeman	IRS Answers Your Questions...DC Plans Holland, Pippins, Zuckerman	PPA Funding Issues Holland	Does the PPA have a HEART? Pippins		PPA Update on Defined Benefit Plans - Part II Holland	EPCRS - How to Clean Up the Mess Kahn, Schaffer
	Current Issues Impacting the EGTRRA Restatement and Determination Letter Process Pippins, Zuckerman	Extreme Actuarial I: Sample 2008 Actuarial Report and Schedule SB Holland	Cash Balance Plans for DC Practitioners Holland		Defined Benefit and Cash Balance Issues Zimmerman	Cash Balance & Other Hot DB Topics Holland	
		403(b) Plans: Not Your Father's TSA Architect	403(b) for 401(k) Practitioners Salyers	403(b) Plans: I Heard There Were Some New Regs...? Salyers	403(b) and 457 Plans Architect	Update on 403(b) Plans Petresanta	
			Plan Terminations Kieffer				How to Avoid Joinder Agreement Pitfalls - To Err is Human, Except When Completing Joinder Agreements Pippins
	AFTAP Certifications Milling, Pippins	IRS Answers Your Questions...on DB Plans Holland, Pippins			Plan & Participant Disclosure Panel Discussion Grinde		Avoiding Minefields - Practical Role Plan on Internal Control Dos and Don'ts Brim, Jones
	Form 5500 and Related Schedules	Look'n at M&A a Whole New Way				EGTRRA Restatements and the IRS Determination Letter Program	To Submit or Not to Submit - Determination Q&A

Milling	Zuckerman			Kieffer	Bell, Pippins, Zuckerman
	409A - It Ain't Over Yet - Compliance, Design and Updates Morrison (Treasury)				Update on 409A - Practical Considerations for Transition and Implementation of the Final Regulations Morrison (Treasury)
Case Studies of Prohibited Transactions and Trust Investment in a Financial Meltdown	Extreme Actuarial II: Review of New Regulations, Sample AFTAP Certifications, Employee Notices and Benefit Calculations				
Lohning, Burleson	Holland				
Terminations in Tumultuous Times Christenson, Abudayyeh	General IRS Guidance Zuckerman, Pippins				
	401(k) Plan Design Today Tawshunsky (Chief Counsel)				Welfare Plans - Update on Regent and Upcoming Welfare Plan Regulations... Knopf (Treasury)
	DB Plan Design Today - Combos, Cash Balance and Employer Needs Holland	Hot Topics in DB Holland		Legislative & Regulatory Update Grinde	
	Issues in Same Gender Benefits Holland, Pippins, Zuckerman			IRS Local Office Presentation Weber, McDonald	What's On the Radar? Local Examination Updates and Issues Jones, Detillian