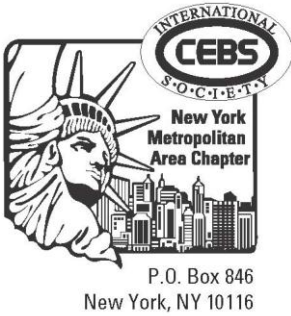


The New York Metro Area Chapter invites you to attend...



Form 5500 Presentation of the 2011 Form 5500 Filings

Plan Administrators of employee benefit plans are required to file an annual report with the Employee Benefit Security Administration (EBSA) that includes the Form 5500 and related schedules, and (if applicable) an Accountant's Opinion. The information presented will include; a discussion on the changes to the Forms 5558, 8955-SSA and their applicable filing deadlines. The presenters will discuss the electronic processing of the materials required to be filed with EBSA, including the current issues that are generating notices to the filers. A review of changes to the 2011 Form 5500 and schedules will also be reviewed.

Speakers from O'Connor Davies, LLP – Employee Benefit Services Group

Timothy J. Desmond – Audit Partner & Director

Timothy J. Desmond, CPA is a Partner from O'Connor Davies, LLP, one of the largest full-service Certified Public Accounting and consulting firms in the tri-state area.

Tim has been with the firm for twenty-two years and is the Director of the Firm's Employee Benefit Service Group. He has extensive experience auditing and providing consulting services to a wide range of industry organizations and their employee benefit plans. O'Connor Davies, LLP is a member of the Employee Benefit Plan Audit Quality Center (EBPAQC) of the American Institute of Certified Public Accountants (AICPA). Also, Tim recently finished a three year-term on the AICPA's Executive Committee overseeing the EBPAQC.

Tim is also an active member of the AICPA and the New Jersey State Society of Certified Public Accountants (NJSSCPA). He is a member of O'Connor Davies, LLP's Accounting and Auditing Committee and is a frequent speaker at the Firm's continuing professional education programs.

Louis F. LiBrandi, Fellow – Principal, Fellow ISCEBS, ChFC, QPA & Enrolled Agent

Louis F. LiBrandi is a Principal at ODMD serving clients in all aspects of employee benefits plans with a specific focus on tax and compliance matters. He is responsible for coordinating and preparing employee benefit plan filings with the EBSA. He also prepares applications under IRS and DOL correction programs, (VFC, VCP), and performs compliance reviews for all types of employee benefit plans and related processes (i.e., payroll, and tax reporting). His other areas of expertise include; consulting on non-qualified deferred compensation plans -457(b), obtaining IRS determination letters, the preparation and review of plan documents and summary plan descriptions for cafeteria and 'wrap plans', as well as plan terminations.

Louis is former President and is a current member of the Board of Directors of the New York Metropolitan Chapter of the International Society of Certified Employee Benefits Specialists (ISCEBS). He is also a member of the American Institute of Certified Public Accountants (AICPA) Tax Task Force as a reviewer of the Form 5500. He has previously instructed CEBS classes at The College of Insurance and Hofstra University. He has co-authored articles with attorneys about responding to IRS and DOL Notices. He has presented on numerous compliance topics, IRS/DOL voluntary programs, and the reporting requirements applicable to welfare, retirement and IRC Section 403(b) plans.

Date: June 6, 2012

Time: Registration check-in begins at 8:30 AM
Continental Breakfast will be served

Presentation / Q & A from 9:00 AM – 10:00 AM

Meeting Location and Directions:

Sony Building, 550 Madison Ave (between 55th and 56th Street)

Take the elevator to the Sky Lobby and meeting is in the Gold room

PLEASE NOTE: PHOTO ID and PRE-REGISTRATION are required to enter the building!

Directions:

Take the "E" to 53rd Street and 5th Avenue or 4,5,6 to 59th Street and Lexington Avenue

Registration Form

Form 5500 Presentation – 2011 Plan

Please Print

Name _____

Company _____

Address _____

City/State/Zip _____

Telephone (____) _____

Fax (____) _____

E-Mail _____

____ Please update my information listed above

____ Please send me membership information

To attend you must register by June 1st (5 pm).

Non-members, please notify us by this date if you registered and cannot attend. Otherwise, you will be billed for the cost of attendance.

NY Metro Area Chapter Meeting Costs:

Member – Free _____ (Provide Chapter if not NY Metro) Non-Member \$25 Fee

Payment can be made via Pay Pal by visiting www.iscebs.org/nymetro by check at the door (see below). If you pay via Pay Pal, please remember to still register for this meeting via Telephone/Fax/E-Mail as indicated below.

Tax ID #: 13-3293220

Registration/Payment (Check) by Mail:

New York Metro Area Chapter – ISCEBS
c/o Silent Secretary
P.O. Box 381
Stanhope, NJ 07874

Registration by Telephone/Fax/E-Mail:

Telephone/Fax: (973) 448-0022
E-Mail: Silent@att.net

For questions please contact:

Janine Keehan, CEBS
education@cebsnyc.org
646-240-1680

Sponsored by the New York Metropolitan Area Chapter of the International Society of Certified Employee Benefit Specialists (ISCEBS), a nonprofit organization that serves as an educational resource for certified employee benefit specialists and others in the employee benefits community.

