



P.O. Box 307  
Grand Central Station  
New York, NY 10017

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

## **Final Service Provider Fee Disclosure Regulations: Now What?**

After multiple delays, the ERISA 408(b)(2) regulations requiring service providers to disclose the scope and cost of services for qualified retirement plans have been finalized and are effective July 1, 2012. But despite the fact that these regulations have been under discussion for several years, many people don't understand exactly what is covered, particularly as the participant fee disclosure rules have gotten the lion's share of attention. There has also been surprisingly little focus on how Plan Fiduciaries can use the information to ensure the quality and cost of services delivered to their qualified retirement plans are reasonable relative to current marketplace standards. Ironically, this was the DOL's stated purpose in developing the regulations in the first place!

Join Alan Vorchheimer as he reviews the regulations and suggests how Plan Fiduciaries can leverage the required disclosures to better monitor the services provided to their retirement plans. Further, he will suggest opportunities to demand increased transparency from service providers - even those not directly covered by these rules.

### **Speaker: Alan Vorchheimer, CEBS, Principal – Buck Consultants, LLC**

Alan Vorchheimer is a Principal in Buck's New York City office, focusing on defined contribution retirement plans. He is frequently quoted in major publications and recently authored an article, "Removed From Reality", in the October 2011 Employee Benefit News

Mr. Vorchheimer received his B.A. from the University of Pennsylvania in economics and political science.

**Date:** Wednesday, March 28, 2012

**Time:** Registration check-in and breakfast begins at 8:30 AM

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

### **Meeting Location and Directions:**

Xerox Knowledge Sharing Center  
(located on North Side of the Lobby)  
245 Park Avenue (between 46th and 47th Street)  
New York, NY 10167

4,5,6, or S or Metro North to Grand Central. Exit through 45th Street MetLife building, cross 45th Street and take E. Helmsley Walk to 46th Street.

OR

Take E to 53rd and Lexington – Exit at 50th and Lexington.

**NOTE: Photo ID and pre-registration are required to enter the building!**

**Registration Form**  
**Final Plan Sponsor Fee Disclosure Regulations:**  
**Now What?**

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 March, 23, 2012 (5pm).**

**Non-members, please notify us by this date if you registered and can not 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](http://www.iscebs.org/nymetro) or by check at the door (see 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](mailto:Silent@att.net)

**For questions please contact:**

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646-240-1680

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