



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

Cash Balance Pension Plans The Latest Strategy in Qualified Plans

Please join us as our speakers, Alan R. Pfeffer and Susan L. Feit, with Sentinel Benefits & Financial Group discuss Cash Balance Pension Plans as a latest strategy in qualified retirement plans. Topics will include:

- Understanding Cash Balance Pension Plans
- Similarities & Differences vs. Traditional Defined Benefit Pension Plans
- Pros & Cons of Cash Balance Pension Plans
- When Should Cash Balance Pension Plans Be Considered

Alan R. Pfeffer, QPA, AIF
Senior Vice President, Sentinel Benefits & Financial Group

Alan R. Pfeffer has been an employee benefits consultant for both profit and not-for-profit businesses for more than 25 years. Alan's area of focus has been in the design, implementation, communication, and administration of qualified and non-qualified retirement plans. His expertise also includes evaluating the effectiveness of retirement plan investments. Alan served as Chief Compliance Officer of Geller Advisory Group and former Managing Director of Geller Group through December 1, 2010 when Geller merged with Sentinel Benefits & Financial Group. Alan holds NASD licenses 6, 63 & 65. Alan also holds an AIF designation, which is an Accredited Investment Fiduciary and is an active member of the Investment Committee of Sentinel Pension Advisors (SPA).

Susan L. Feit, FCA, MAAA, MSPA
Director & Consulting Actuary, Sentinel Benefits & Financial Group

Susan L. Feit has over 30 years of actuarial experience and is responsible for approximately 325 qualified retirement plans, including approximately 150 defined benefit plans. Susan manages a team of six employees, which include Defined Benefit and Defined Contribution Plan Consultants and a Compliance Reviewer. At Sentinel Benefits & Financial Group, Susan is responsible for all defined benefit plan ERISA review and consulting, defined benefit plan FASB reports for accountants, defined contribution plan design, overall workflow of team, billing, and analysis of new pension laws. Susan is a Fellow Member of the Conference of Consulting Actuaries (FCA), a member of the American Academy of Actuaries (MAAA), a member of the American Society of Pension Professionals & Actuaries (MSPA) and has been Enrolled Actuary (EA) since 1995.

Date: Wednesday, October 16, 2013
Time: Registration check-in begins at 8:30 AM
Presentation / Q & A from 9:00 AM - 10:00 AM

Meeting Location and Directions:

Penguin Random House, 1745 Broadway, 14th Floor, Dr. Seuss Room (b/t 55th & 56th St)

Directions

Take the 1, A, or C to Columbus Circle, the N, Q, or R to 57th St / 7th Ave, the B, D, or E to 53rd St / 7th Ave, or take the F to 55th St / 6th Ave

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



Online Registration Form

Cash Balance Pension Plans The Latest Strategy in Qualified Plans

[REGISTER HERE](#)

To attend you must register by **Friday, October 11, 2013 (5 PM)**

Attendees of this event will receive 1.0 CEBS CPE credit

If you will not be able to attend, please notify us no later than 5:00 PM on Friday, October 11, 2013. Non-members not able to attend must notify us by this date to receive a refund.

NY Metro Area Chapter Meeting Costs:

Member – Free
Non-Member – \$25 Fee

Payment for non-members of the NY Metro Chapter:

- Via PayPal, you will be taken to the payment page once you [register](#) for the event on our [website](#).
- In-person via check-in at the event. When you [register](#), please add a note in the “additional comments” field that you will pay at the event via check. At the registration desk please provide your check made payable to “**New York Metro Area Chapter – ISCEBS**”.

Tax ID #: 13-3293220

The NY Metro Chapter of ISCEBS is now accepting online [registrations](#). Please contact Sue Andres if you have any questions or feedback regarding the new registration process:

E-Mail: support@cebsnyc.org
Telephone: (718) 705-4263

For questions about the program, please contact Rich Raia:

E-Mail: education@cebsnyc.org
Telephone: (732) 266-4222

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.

