



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

## **Current Matters Effecting Employee Benefit Plans – Panel Presentation**

Please join us as Lou LiBrandi, a favorite Chapter speaker and DC expert, provides a brief overview of current employee benefit matters from a recent Washington event he attended. This will kick off an engaging panel discussion featuring Lou, Arthur Grutt, who helps employers navigate the complexities of employer-sponsored healthcare plans and Richard Schwamb, a 401(k) advisor.

The panel discussion will cover current matters effecting employee benefit plans including what employees should be aware of on both the welfare side, specifically Healthcare Navigation and on the defined contribution front.

### **Louis F. LiBrandi, CEBS**

#### **Principal, Employee Benefit Services Group, PKF O'Connor Davies, LLP**

Louis F. LiBrandi is a Principal of the Employee Benefit Services Group of PKF O'Connor Davies, LLP. He has more than 25 years of extensive experience with employee benefit plans. He frequently provides guidance on satisfying the many qualification requirements of retirement (including 403(b) and 401(k)), nonqualified deferred compensation plans, and certain features of welfare/cafeteria arrangements. He frequently represents accounts under examination by the IRS and DOL. Louis has attained Fellowship status with the International Society Certified Employee Benefit Specialists and has attained the American College's Chartered Financial Consultant designation. He has also attained the TGPC designation from ASPPA.

### **Arthur Grutt, CEBS**

#### **Managing Partner, Cambridge Insurance Advisors**

As Partner-in-Charge of the firm's Employee Benefits Group, Arthur Grutt helps employers navigate the complexity of health insurance. Art earned a Certified Employee Benefit Specialist (CEBS) designation in 2006, served on the board of the NY ISCEBS chapter and acted as Board President in 2012. As employers are frustrated with the status quo, Art brings a unique and new perspective around managing claim costs, specialty pharmacy, member advocacy and compliance.

### **Richard Schwamb**

#### **Corporate Retirement Director, C(k)P and Senior VP & Financial Advisor, The Schwamb O'Day Group, at Morgan Stanley**

Richard has advised retirement plans on Fiduciary Responsibilities, Plan Design, Investment reviews, and educating participants for 20 years. Prior to this, he was a Corporate Controller and Treasurer where he started one of the early 401(k) plans in the State of NJ for his company. He was hooked and ultimately moved to the Retirement plan marketplace.

**Date:** Thursday, November 29, 2018

**Time:** Registration check-in begins at 8:30 AM, Breakfast will be provided  
**Presentation / Q & A from 8:45 AM – 10:00 AM**

**Meeting Location and Directions: [\(new location!\)](#)**

**Arthur J. Gallagher & Co. 250 Park (between 46<sup>th</sup> and 47<sup>th</sup> street) 5th floor, New York, 10177**



# Online Registration Form

---

## Current Matters Effecting Employee Benefit Plans – Panel Presentation

### [REGISTER HERE](#)

To attend you must register by **Monday, November 26, 2018 (5 PM)**

Attendees of this event will receive 1.5 hour CEBS CPE credit.

**This event will also be eligible for 1.25 hours of HRCI credit, pending approval by the HCRI, and 1.25 hours of SHRM PDC credit, pending approval by SHRM.**

**Members who have registered for this event and are not able to attend, please notify us no later than 9am on Monday, November 26, 2018. Non-members who are not able to attend must notify us by this date to receive a refund.**

#### **NY Metro Area Chapter Meeting Costs:**

Member – Free

Non-Member – \$30 Fee\*

*\* A CEBS student who pays for two monthly education sessions during the calendar year will gain NY Metro Chapter membership for the remainder of the year.*

#### **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](#).

\*Please note that the NY Metro Chapter will no longer accept payment by check during registration on the day of the event. **All non-members must pay through PayPal.**

**Please contact Sue Andres if you have any questions or feedback regarding the new registration process:**

E-Mail: [support@cebsnyc.org](mailto:support@cebsnyc.org)

*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.*

