



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

Form 5500 and Related Reporting and Compliance Matters

Please join us as Louis F. LiBrandi of PKF O'Connor Davies, LLP discusses the Form 5500 reporting requirements and other compliance matters affecting employee benefit plans, including:

- Changes to the Form 5500 for the 2018 plan year
- Overview of the Form 5500 and related schedules
- Overview of the IRS Form 8955-SSA
- Highlights of the DOL's Delinquent Filer Voluntary Compliance (DFVC) program
- Other recent news regarding reporting of employee benefit plans

Louis F. LiBrandi

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. Louis previously served as a Director in the Compensation and Benefits Advisory Services Practice at a law firm, was a Senior Manager at a Big Four accounting firm, and gained valuable experience as a Revenue Agent within the IRS Employee Plans Division. A recognized expert on matters regarding the Form 5500, Louis speaks annually about this and other retirement plan topics for the New York Chapter of CEBS, and other organizations. 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 of Certified Employee Benefit Specialists and has attained the American College's Chartered Financial Consultant designation. He has also attained the TGPC designation from ASPPA.

Date: Thursday, June 13, 2019

Time: Registration check-in begins at 8:30 AM

Presentation / Q & A from 8:45 AM – 10:00 AM

Meeting Location and Directions:

Arthur J. Gallagher, 250 Park Avenue, 5th floor (Between E. 46th and E. 47th Streets)

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



Online Registration Form

Form 5500 and Related Reporting and Compliance Matters

[REGISTER HERE](#)

To attend you must register by **Monday, June 10, 2019 (5 PM)**

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

This event will also be eligible for 1.25 hour of HRCI credit, pending approval by the HRCI, and 1.25 hour 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 5:00 PM on Monday, June 10, 2019. 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](#).

All non-members must pay through PayPal.

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

E-Mail: 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.

