

ISCEBS

New York Metro Area Chapter

Proudly Presents State of the Art Benefit Plans

A One-Day Course

October 10, 2012

Do you have a firm grasp on the latest trends in employer-sponsored benefit plans? Employer-sponsored programs are best understood in the context of their critical role in helping employees to obtain their health and wealth goals and allowing plan sponsors to recruit and retain the right talent.

You are invited to attend this one-day course which is aimed at providing you with information about getting the best value out of your renewals, emerging funding options, legislative requirements, tax implications, and how recent legislation may impact plan sponsor choices.

The following attendees may find this one day program helpful:

- Recent entrants to the employee benefits field can gain a broader understanding of their profession.
- Experienced benefit professionals seeking to expand and update their knowledge
- Financial professionals may obtain a deeper understanding of employer sponsored employee benefit programs and their role in helping employees achieve their personal financial goals and objectives.

The one-day course is sponsored by the New York Metro Area Chapter of the International Society of Certified Employee Benefit Specialists, a nonprofit organization that serves as an educational resource in the field of employee benefits.

This program is pending approval from HRCI for PHR, SPHR and GPHR professionals to receive four business management and strategy credit hours.

Program Agenda

Date: October 10, 2012

Time: 8:30 a.m.: Registration, **Networking** and Continental Breakfast
9:00 a.m. – 4:30 p.m.

Location: The Xerox Building
245 Park Avenue
New York, NY 10167-0002
Please be sure to bring a government issued Photo I.D.

Dress Code: Business Casual

Cost: \$200
Group discount rate: \$175/each for three (3) or more, from same firm
Fee includes Reference Guide (on zip drive), breakfast, lunch, and snacks.

R.S.V.P.: By October 1, 2012

Confirmation of registration will be sent by email (USPS if email is not provided).
Cancellations after October 5, 2012 cannot be refunded.

Program Schedule

8:30 a.m.-9:00 a.m. - Registration and Continental Breakfast

9:00-9:15 a.m. - Introduction and Opening Remarks

Art Grutt, CEBS

9:15 – 10:15 a.m. - Medical Plan Renewals

Eric Jacobson, CEBS

- Fully-Insured
- Self- Insured
- Stop-loss
- Health cost control/Risk Stratification
- Tax and Qualification Issues
- FSA/HRA/H.S.A and
- Recent updates (PPACA)

10:15 – 10:30 a.m. – Networking Break – refreshments provided

10:30 – 11:30 a.m. - Renewing Fully Insured Plans

John Spellane

- Life Insurance
- LTD
- STD

11:30 – 12:30 p.m. - Successful Wellness Programs

Kristen Vener, CEBS

12:30 – 1:30 a.m. – Lunch

1:30 – 2:30 - Defined Contribution Plans

Len Comberiate, CEBS

- Expense Disclosure
- Investment Options
- Asset Allocations
- Auto Enrollment/Escalation
- Sustainable Withdrawals
- Compliance – Reporting and Disclosures

2:30 – 2:45 a.m. – Networking Break – refreshments provided

2:45 – 3:45 p.m. - Defined Benefit Plans

Brian M. Laibach

- **Frozen or Ongoing**
- **Expense Disclosure**
- **Funding Considerations (80%/60% rule and impact to NQ plans)**
- **Participant Disclosure**
- **Cash Balance Conversions**
- **Fiduciary liability and responsibilities**

3:45 – 4:30 p.m. - Compliance Issues

Sarah Richards, CEBS

- **Reporting Requirements – 5500s, Schedules As**
- **Claims Procedures/IRP requirements**
- **SPD requirements/SBC/ERISA requirements**
- **HIPAA Privacy Rules**

For additional program information, please contact Sarah Richards at (212) 282-7463.

For questions concerning payment of the seminar fee and confirmation of registration, please contact the NY Metro Area Chapter of ISCEBS business office by Telephone at (973) 448-0022 or e-mail to Silent@att.net

***Note: Though we fully anticipate the program will be presented as outlined above, New York Metro Chapter reserves the right to update the topics discussed or change presenters without prior notice.**

Note also the NY Metro Chapter attempts to be as “green” as possible. Therefore, you will only receive a zip drive file containing the presentations at the meeting. Pads of paper for notes and pens will be available during the presentations.

**NY-Metro Chapter-ISCEBS
State of the Art Benefit Plans
Registration Form**

The Xerox Building
245 Park Avenue
New York, NY 10167-0002

October 10, 2012

Name:

Title:

Company:

Address:

City, State Zip:

Phone:

Fax:

E-Mail:

Make Check Payable to:
NY Metro Chapter-ISCEBS
Tax ID# 13-3293220

Payment via Pay Pal

Payment can be made via Pay Pal or credit card by visiting www.iscebs.org/nymetro.

Please note that if paying by Pay Pal or credit card, you still need to submit this registration form via email or fax.

Mail to:

NY Metro Chapter-ISCEBS
c/o Silent Secretary
P.O. Box 381
Stanhope, NJ 07874

E-Mail: Silent@att.net

Fax: (973) 448-0022