

# ISCEBS

New York Metro Area Chapter

Proudly Presents

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## Health & Welfare Plan Fundamentals

### A One-Day Seminar

May 14, 2009

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This one-day program on the basics of health and welfare plans is designed for recent entrants to the employee benefits field and more experienced benefits professionals seeking to reinforce their skills and keep up with the ever changing environment of the industry. It is an excellent way for new hires and transfers to get up to speed on important benefit issues as quickly as possible.

Participants will analyze and discuss various health and welfare alternatives as well as recent legislation and new developments in the employee benefits field.

The one-day seminar 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.

For additional information, please call Arthur Grutt at (212) 695-7495 x14 or Randi Weingarten at (646) 452-1955.

For questions concerning payment of the seminar fee and confirmation of registration, please call the chapter business office. Telephone/fax (973) 448-0022 or e-mail to [Silent@worldnet.att.net](mailto:Silent@worldnet.att.net)

### **Program Details**

Date: May 14, 2009

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

Location: American Management Association  
1601 Broadway,  
New York, NY 10019  
(Between West 48<sup>th</sup> & West 49<sup>th</sup> St.)  
Please be sure to bring a government issued Photo I.D.

Dress Code: Business Casual

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

R.S.V.P.: By Friday, May 8, 2009

Confirmation of registration will be sent by email (USPS if email is not provided).

Cancellations after May 8, 2009 cannot be refunded

## **Program Schedule\***

### **Employer-Sponsored Health Care Programs in 2009 - Anthony P. Rienzi, Principal, Buck Consultants**

- I. Medical Plan Design: Then and Now
- II. Consumer-Directed Health Plans: Key Concepts and Objectives
- III. Cost Management Strategies
- IV. Plan Financing Approaches
- V. Basic Regulatory Requirements
- VI. Recent Developments

### **Flexible Benefit Plans - Leonard B. Comberiate, CEBS, Senior Director of Benefits & Collectively Bargained Plans, The Great Atlantic & Pacific Tea Company**

- I. History and Objectives
- II. Steps to Implement a Flex Plan
- III. Type of Plans
- IV. Non Discrimination Issues
- V. Overview of 2007 Regulations
- VI. Reporting Issues
- VII. Communications
- VIII. Future of Flex Plans

### **Legislative Updates - William B. Duff, Partner, Katten Muchin Rosenman LLP**

- I. ERISA Welfare Plan – Defined
- II. Summary Plan Description Requirements
- III. Claims Procedures
- IV. Reporting Requirements: Electronic Distribution of Plan Documents
- V. Section 409A of the IRS Code: Severance Pay

### **Dental, Life & Disability Plans - Brent N. Botts, Executive Sales Consultant & Eric Hamilton, Director of Product Development, Guardian**

- I. Plan Design Considerations
- II. Funding and Underwriting
- III. Dental Networks – PPO and DMO
- IV. Tax and Compliance Issues
- V. Statutory Disability, Supplemental Short- and Long-Term Disability

\*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.

**8:30-9:00 a.m. - Continental Breakfast**

**9:00 – 9:15 a.m. - CEBS Presentation**

**9:15-10:30 a.m. - Program**

**10:30-10:45 a.m. - Break**

**10:45 a.m.-12:00 noon - Program**

**12:00 noon-12:45 p.m. - Lunch**

**12:45 p.m.-2:15 p.m. - Program**

**2:15-2:30 p.m. - Break**

**2:30-4:00 p.m. - Program**

## Registration Form

ISCEBS Health and Welfare Fundamentals  
May 14, 2009

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**Name:**

**Title:**

**Company:**

**Address:**

**City, State Zip:**

**Phone:**

**Fax:**

**E-Mail:**

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

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