



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

Form 5500 & Related Reporting for Employee Benefit Plans

Please join us as our speakers, Louis LiBrandi and Stephen Machinski of PKF O'Connor Davies, LLP, discuss the Form 5500 and related reporting required to be filed annually with the DOL and IRS, including what's new and other updates for the 2015 plan year.

Louis F. LiBrandi, CEBS, ChFC, QPA
PKF O'Connor Davies, LLP

Louis F. LiBrandi is a Principal of the Employee Benefit Services Group of PKF O'Connor Davies, LLP and has more than 25 years of extensive experience with employee benefit plans. He 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. He frequently represents accounts under examination by the IRS and DOL.

Louis is a graduate of Long Island University with a Bachelor of Science degree in Accounting and also has TGPC (Tax-Exempt and Governmental Plan Consultant) certification from ASPPA. He is a member of the American Institute of Certified Public Accountants' Tax Task Force regarding the Form 5500 and is a past President of the Certified Employee Benefit Specialists New York Metro Chapter Board of Directors. He has attained Fellowship status with the International Society of Certified Employee Benefits Specialists (ISCEBS) and also previously served on their Professional Development Committee.

Stephen Machinski, CPA
PKF O'Connor Davies, LLP

Stephen is a Senior Audit Manager with PKF O'Connor Davies, LLP. He has 18 years of experience practicing accounting and auditing with an extensive background in serving not-for-profit organizations, including religious organizations, social service agencies, educational institutions and health and welfare organizations and associations.

Stephen is a frequent lecturer for in-house not-for-profit continuing professional education programs. He is a graduate of Rutgers University with a Bachelor of Science degree in Accounting. He is also a Certified Public Accountant licensed in the State of New York and New Jersey and is a member of the American Institute of Certified Public Accountants and the New York and New Jersey State Societies of Certified Public Accountants.

Date: Tuesday, June 14, 2016
NEW: **Please note our new start time at 8:45 AM.**
Time: Registration check-in begins at 8:30 AM
Presentation / Q & A from 8:45 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

Form 5500 & Related Reporting for Employee Benefit Plans

[REGISTER HERE](#)

To attend you must register by **Friday, June 10, 2016 (5 PM)**

Attendees of this event will receive 1.0 hour CEBS CPE credit.

NEW: This event will also be eligible for 1.0 hour of HCRI credit, pending approval by the HCRI, and 1.0 hour of SHRM PDC credit, pending approval by SHRM.

If you will not be able to attend, please notify us no later than 5:00 PM on Friday, June 10, 2016. 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 – \$30 Fee*

** Any non-member that attends and pays for two meetings in 2016 will automatically become a member of the Chapter for the remainder of the year (if eligible).*

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.**

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 Tanisha Figueroa or William Chase:

E-Mail: education@cebsnyc.org

Telephone: (646) 801-8793

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.

