



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

## **Employee Benefit Plans Update - 2017**

Please join us as our speakers, Louis F. LiBrandi and Joseph J. Farrenkopf of PKF O'Connor Davies, LLP, discuss changes and potential updates across employee benefit plans, including:

- Changes to the Form 5500 (2016 & beyond)
- IRS Examination Issues Update/DOL Advisory Council
- IRS Determination/Opinion Letter Update (including 403(b) Plan Status Update)

### **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 Certified Employee Benefit Specialists and has attained the American College's Chartered Financial Consultant designation. He has also attained the TGPC designation from ASPPA.

### **Joseph J. Farrenkopf, CPA**

#### **Audit Manager, PKF O'Connor Davies, LLP**

Joseph Farrenkopf is an Audit Manager with PKF O'Connor Davies, LLP. Joseph has seven years of experience in public accounting. He specializes in audits of employee benefit plans. He has assisted in developing the firm's streamline approach to insure an efficient and effective audit. He manages over 75 employee benefit plan audits each year. Joseph attends various employee benefit plan audit training each year and most recently attended the American Institute of Certified Public Accountants Employee Benefit Plans Accounting, Auditing and Regulatory Update for 2016. Joseph is a member of the American Institute of Certified Public Accountants and New York State Society of Certified Public Accountants.

**Date:** Tuesday, June 13, 2017

**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/w 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

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## Employee Benefit Plans Update - 2017

### [REGISTER HERE](#)

To attend you must register by **Friday, June 9, 2017 (5 PM)**

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

**This event will also be eligible for 1.0 hour of HRCI credit, pending approval by the HCRI, and 1.0 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 Friday, June 9, 2017. 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.**

**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](mailto:support@cebsnyc.org)

Telephone: (718) 705-4263

**For questions about the program, please contact Marie Villeneuve or Gregory Hankins:**

E-Mail: [education@cebsnyc.org](mailto: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.*

