

# Benefits Conferences

List of Topics and IRS/Treasury Speakers Involved  
as of 6/16/08

## Completed Benefits Conferences

	21st Annual Cincinnati Employee Benefits Conference	Northeast Benefits Conference	Mid-Atlantic Benefits Conference	Great Lakes Benefits Conference	Los Angeles Benefits Conference	SWBA/IRS 18th Annual Employee Benefits Conference	Benefits Conference of the South
Web site link for further information	<a href="#">2007 CEBC</a>	<a href="#">2008 NEBC</a>	<a href="#">2008 MABC</a>	<a href="#">2008 GLBC</a>	<a href="#">2008 LABC</a>	<a href="#">2007 SWBA</a>	<a href="#">2007 BCOS</a>
Dates	6/12/08 - 6/13/08	6/12/08 - 6/13/08 Boston, MA and New York, NY	5/22/08 - 5/23/08	4/3/08 - 4/4/08	1/24/08 - 1/25/08	11/15/07 - 11/16/07	9/20/07 - 9/21/07
Location	Cincinnati, OH	Boston, MA and New York, NY	Washington, DC	Chicago, IL	Los Angeles, CA	Dallas, TX	Atlanta, GA
Topic/Speaker							
	<b>Determinations and Examinations Update</b> Zuckerman, Jones	<b>Washington DC Update</b> Templeman	<b>Employee Plans Priorities and Direction</b> Julianelle	<b>Washington Legislative and Regulatory Update</b> Pippins, Tawshunsky (Counsel)	<b>Washington Update</b> Zuckerman	<b>IRS National Office Presentation</b> Zuckerman	<b>IRS National Office Update - Current Projects and Enforcement Initiatives</b> Bellanger, Templeman, Zuckerman
		<b>Update on EPCRS - Correcting Common Errors in DB and DC Plans</b> Feldman, Holland	<b>EPCRS Update: The Latest News from the Correction Programs</b> Kahn, O'Donnell	<b>EPCRS Advanced Correction Methods</b> Kahn, Zuckerman	<b>EPCRS - Variations/ Guidance for Smaller Companies and Other New/ Emerging Issues</b> Masushige		<b>How to Fix Common Errors (Case Studies in EPCRS)</b> Bond
			<b>Examinations Update &amp; Navigating the IRS Web Site</b> Templeman, Thomas	<b>IRS Examination Critical Priorities</b> Templeman, Gore	<b>IRS Employee Plans Examination and Enforcement</b> Templeman	<b>IRS &amp; DOL Compliance Activities</b> Templeman, Bellanger	<b>How to Conduct a Compliance Audit</b> Bailey-Funk, Bellanger
					<b>Mergers and Acquisitions - DOL Regulations /IRS Audits</b> Holland		
	<b>Pre-Approved Plans</b> Atlas, Noe	<b>Defined Contribution Plan Design and Operation Under PPA</b> Migdail	<b>Rulings &amp; Agreements Update</b> Holland, Zuckerman		<b>Actuarial Session (Pre-Conference Session)</b> Holland, Kimlin		
		<b>PPA Update on Defined Benefit Plans - Part I</b> Holland	<b>Auto Enrollment - Keeping Your Eyes on the Plan and Your Hands on the Rules to Avoid a Qualification Disaster</b> Migdail	<b>401(k) Design and Implementation After PPA 2006</b> Tawshunsky (Counsel)		<b>The Automatic Retirement Plan</b> Pippins	<b>Automatic Enrollment &amp; QDIAs</b> Pippins
		<b>PPA Update on Defined Benefit Plans - Part II</b> Holland	<b>EPCRS - How to Clean Up the Mess</b> Kahn, Schaffer	<b>Defined Benefit Funding Rules after PPA/Other Defined Benefit Issues/Schedule SB Update</b> Milling, Pippins	<b>Defined Benefit Funding Changes</b> Holland	<b>Defined Benefit Plan Update</b> Pippins	<b>Hot Topics for DB Plans</b> Pippins
	<b>Defined Benefit and Cash Balance Issues</b> Zimmerman	<b>Cash Balance &amp; Other Hot DB Topics</b> Holland			<b>Cash Balance Plan Update</b> Kimlin		<b>Cash Balance Plans - Hybrid Vehicles that Get Great Mileage</b> Pippins
	<b>403(b) and 457 Plans</b> Architect	<b>Update on 403(b) Plans</b> Petresanta		<b>Ready, Set, Go ... Compliance Countdown for 403(b) and 457(b) Plans</b> Architect, Press	<b>403(b) Plans</b> Architect	<b>403(b) Final Regulations</b> Architect	<b>403(b) Exam and Regulatory Update</b> Architect
			<b>How to Avoid Joinder Agreement Pitfalls - To Err is Human, Except When Completing Joinder Agreements</b> Pippins		<b>General IRS Guidance (Pre-Conference Session)</b> Pippins	<b>Stories from the PPA 2006 Front</b> Pippins	

<b>Plan &amp; Participant Disclosure Panel Discussion</b> Grinde		<b>Avoiding Minefields - Practical Role Plan on Internal Control Dos and Don'ts</b> Brim, Jones		<b>New Disclosure Requirements: What are We Telling Participants?</b> Pippins		
	<b>EGTRRA Restatements and the IRS Determination Letter Program</b> Kieffer	<b>To Submit or Not to Submit - Determination Q&amp;A</b> Bell, Pippins, Zuckerman	<b>The Determination Letter Program, Guidance and Other Operating Priorities</b> Pippins, Micelli, Zuckerman		<b>Living with the Remedial Amendment Period</b> Pippins, Grinde	<b>Plan Document Update (EGTRRA Restatements, Interim Amendments, Defining Groups in Cross-Tested Plans)</b> Pippins
		<b>Update on 409A - Practical Considerations for Transition and Implementation of the Final Regulations</b> Morrison (Treasury)	<b>409A Problem Solving and Drafting Issues</b> Morrison (Treasury), Tackney (Counsel)	<b>409A and Beyond</b> Morrison (Treasury)	<b>409A Before the Bell</b> Morrison (Treasury)	<b>What's New with 409A</b> Hogans (Treasury)
		<b>Welfare Plans - Update on Regent and Upcoming Welfare Plan Regulations...</b> Knopf (Treasury)		<b>Health &amp; Welfare Update</b> Khoury (Counsel)		
<b>Legislative &amp; Regulatory Update</b> Grinde			<b>Practicing as an ERPA Before the IRS</b> Lohning, Oshinsky, Templeman	<b>Comparison of the IRS and DOL Electronic Media Guidelines</b> Pippins		
<b>IRS Local Office Presentation</b> Weber, McDonald		<b>What's On the Radar? Local Examination Updates and Issues</b> Jones, Detillian		<b>IRS Q&amp;A</b> Pippins, Holland, Zuckerman		<b>IRS Q&amp;A</b> Bellanger, Bond, Templeman, Zuckerman
	<b>Ask the Experts</b> Various	<b>Ask the Experts</b> Holland, Jones, Pippins		<b>Ask the Experts</b> Holland, Pippins		