

Benefits Conferences

List of Topics and IRS/Treasury Speakers Involved
as of 11/22/08

Completed Benefits Conferences

	SWBA/IRS 19th Annual Employee Benefits Conference	21st Annual Cincinnati Employee Benefits Conference	Northeast Benefits Conference	Mid-Atlantic Benefits Conference	Great Lakes Benefits Conference	Los Angeles Benefits Conference
Web site link for further information	2008 SWBA	2007 CEBC	2008 NEBC	2008 MABC	2008 GLBC	2008 LABC
Dates	11/20/08 - 11/21/08	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
Location	Dallas, TX	Cincinnati, OH		Washington, DC	Chicago, IL	Los Angeles, CA
Topic/Speaker						
	National Office Update: Rulings and Agreements Zuckerman	Determinations and Examinations Update Zuckerman, Jones	Washington DC Update Templeman	Employee Plans Priorities and Direction Julianelle	Washington Legislative and Regulatory Update Pippins, Tawshunsky (Counsel)	Washington Update Zuckerman
	Meet the New EPCRS....Same as the Old EPCRS? Ruprecht		Update on EPCRS - Correcting Common Errors in DB and DC Plans Feldman, Holland	EPCRS Update: The Latest News from the Correction Programs Kahn, O'Donnell	EPCRS Advanced Correction Methods Kahn, Zuckerman	EPCRS - Variations/ Guidance for Smaller Companies and Other New/ Emerging Issues Masushige
	Retirement Plan Examinations Templeman, Bellanger			Examinations Update & Navigating the IRS Web Site Templeman, Thomas	IRS Examination Critical Priorities Templeman, Gore	IRS Employee Plans Examination and Enforcement Templeman
	457(b) and 457(f) Plan Issues Architect					Mergers and Acquisitions - DOL Regulations /IRS Audits Holland
		Pre-Approved Plans Atlas, Noe	Defined Contribution Plan Design and Operation Under PPA Migdail	Rulings & Agreements Update Holland, Zuckerman		Actuarial Session (Pre-Conference Session) Holland, Kimlin
	The Automatic Retirement Plan: Guidance Updates Pippins		PPA Update on Defined Benefit Plans - Part I Holland	Auto Enrollment - Keeping Your Eyes on the Plan and Your Hands on the Rules to Avoid a Qualification Disaster Migdail	401(k) Design and Implementation After PPA 2006 Tawshunsky (Counsel)	
	Does the PPA have a HEART? Pippins		PPA Update on Defined Benefit Plans - Part II Holland	EPCRS - How to Clean Up the Mess Kahn, Schaffer	Defined Benefit Funding Rules after PPA/Other Defined Benefit Issues/Schedule SB Update Milling, Pippins	Defined Benefit Funding Changes Holland
		Defined Benefit and Cash Balance Issues Zimmerman	Cash Balance & Other Hot DB Topics Holland			Cash Balance Plan Update Kimlin
	403(b) Plans: I Heard There Were Some New Regs...? Salyers	403(b) and 457 Plans Architect	Update on 403(b) Plans Petresanta		Ready, Set, Go ... Compliance Countdown for 403(b) and 457(b) Plans Architect, Press	403(b) Plans Architect
				How to Avoid Joinder Agreement Pitfalls - To Err is Human, Except When Completing Joinder Agreements Pippins		General IRS Guidance (Pre-Conference Session) Pippins
		Plan & Participant Disclosure Panel Discussion Grinde		Avoiding Minefields - Practical Role Plan on Internal Control Dos and Don'ts Brim, Jones		New Disclosure Requirements: What are We Telling Participants? Pippins

	EGTRRA Restatements and the IRS Determination Letter Program Kieffer	To Submit or Not to Submit - Determination Q&A Bell, Pippins, Zuckerman	The Determination Letter Program, Guidance and Other Operating Priorities Pippins, Micelli, Zuckerman	
		Update on 409A - Practical Considerations for Transition and Implementation of the Final Regulations Morrison (Treasury)	409A Problem Solving and Drafting Issues Morrison (Treasury), Tackney (Counsel)	409A and Beyond Morrison (Treasury)
		Welfare Plans - Update on Regent and Upcoming Welfare Plan Regulations... Knopf (Treasury)		Health & Welfare Update Khoury (Counsel)
	Legislative & Regulatory Update Grinde		Practicing as an ERPA Before the IRS Lohning, Oshinsky, Templeman	Comparison of the IRS and DOL Electronic Media Guidelines Pippins
	IRS Local Office Presentation Weber, McDonald	What's On the Radar? Local Examination Updates and Issues Jones, Detillian		IRS Q&A Pippins, Holland, Zuckerman
	Ask the Experts Various	Ask the Experts Holland, Jones, Pippins		Ask the Experts Holland, Pippins