

2009 SPARK Forum: Waves of Change

November 8 - 10, 2009

Steve Saxon and David Levine will serve as speakers at the 2009 SPARK Forum held from November 8th - 10th in Palm Beach, FL. Their panel, "Fiduciary Responsibilities surrounding ERISA and Non-ERISA 403(b) Plans," will discuss the fiduciary obligations surrounding ERISA and Non-ERISA 403(b) plans. The session will cover the compliance differences between ERISA and non-ERISA plans under the new IRS regulations, the issues raised by the combination of pre-2009 "grandfathered" contracts and new contracts, and the interaction of multiple 403(b) plans.