

# 403(b) SEMINAR

TUESDAY, OCTOBER 13<sup>TH</sup>  
8:00 AM - 11:30 AM



**Attention: Colleges and Universities**  
**Join us for a complimentary seminar on:**

## **ERISA 403(b) PLANS - WHAT TO DO BEFORE AND AFTER JANUARY 1, 2010**

**Tuesday | October 13, 2009**

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<b>Seminar Date</b>	Tuesday, October 13, 2009
<b>Seminar Location</b>	The City Bar Association, 42 West 44th Street, New York NY (Between 5th and Avenue of the Americas, convenient to Grand Central)
<b>Time</b>	8:00 a.m. – 9:00 a.m. Registration and Continental Breakfast 9:00 a.m. – 11:30 a.m. Seminar

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### **Seminar Overview:**

With only a few months to go, are you following not just the final 403(b) regulations but ERISA best practices? Are you ready for the new 5500 and audit requirements? And just how does a 403(b) plan comply with ERISA when it is so different from a 401(k) plan? Veterans in the 403(b) marketplace, Cammack LaRhette Consulting and the Groom Law Group are co-sponsoring a special 403(b) seminar in midtown Manhattan for college and university organizations with ERISA-covered 403(b) plans. It is designed to give you all the practical steps you need to take to comply with both the final IRS regulations and ERISA and answer any specific questions you may have regarding your plan.

### **In our live seminar, you'll get an overview of:**

- ERISA versus non-ERISA planning: is the DOL safe harbor worth it?
- IRS transition relief for 2009; what does it mean?
- Will the new IRS prototype plan program be useful?
- New 5500 filing requirements for 2009 plan year and FAB 2009-2 transition relief
- Who is a fiduciary under ERISA and why is it important?
- Best practices to fulfill ERISA fiduciary duties
- Avoiding prohibited transactions
- Evaluation of investment vendors and investments; RFP processes
- Monitoring investments and fees
- What to do about 403(b) contracts over which the plan sponsor has little control
- Are older contracts still plan assets subject to ERISA fiduciary duties?
- Marketplace trends in investments

A Question & Answer session with the speakers will follow the seminar presentation.

**Due to high demand and limited space we encourage you to register for this event as soon as possible.**

[Click here](https://clcinc.ilinc.com/register/vmmrwkb) to register, or copy and paste the following into your browser: <https://clcinc.ilinc.com/register/vmmrwkb>. For more information, email [CammackLaRhette@clcinc.com](mailto:CammackLaRhette@clcinc.com)

Cammack LaRhette is a full service employee benefits and human resources consulting firm, specializing in non-profit organizations and 403(b) plans. Visit us at: [www.clcinc.com](http://www.clcinc.com).

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