



EmployeeBenefit  
news

# Compliance

## SUMMIT 2010

April 20, 2010

NRECA Conference Center | Arlington, VA

*Surveying the Legal  
and Regulatory Landscape  
for 2010*

- ▶ Recent Developments in Health Care Reform
- ▶ New Demands for 401(k) Administration
- ▶ Grappling with GINA
- ▶ COBRA's Twists and Turns
- ▶ And more...

### Registration Information

#### ▶ 3 WAYS TO REGISTER

**WEB:** <http://ebn.benefitnews.com/conferences/compliance/>

**PHONE:** 800-803-3424

**MAIL:** visit our website to download a printable registration form

	Early Bird Price <i>Before 3/12/2010</i>	Standard Price <i>After 3/12/2010</i>
Standard Summit Pass	\$295	\$495
WACABA Member Pass	\$195	\$395

**PAYMENTS:**

Please make checks payable to SourceMedia and include the name(s) of the attendee(s) on the face of the check. We accept American Express, Diners Club, Discover, Visa, and MasterCard. Registration fees include all meals, refreshment breaks, receptions and a copy of the conference workbook. In order to receive early bird discounts, special rates or promotions, full payment must be made prior to the offer expiration date. Any registration not paid in full at that time of offer expiration date will be subject to the current rate. Full Payment must be received 14 days prior to the event or your registration will automatically be cancelled. Registrations with declined or invalid credit cards will not be processed.

**SUBSTITUTIONS AND CANCELLATIONS:**

Substitutions may be sent at any time. No refunds or letters of credit are available later than the event Cut Off Date (14 Days prior to start date). All cancellations must be made in writing, submitted within 90 days prior to the Cut Off Date of the event and will be subject to a cancellation fee equal to 50% off the registration fee or a Letter of Credit which will cause forfeiture of the entire registration fee but allow one admittance to a future SourceMedia event to be used in the same year. No refunds will be issued on any Exhibit Hall Only passes.

**DISCLAIMER:**

Source Media reserves the right to cancel an event at any time. Source Media reserves the right to replace or cancel speakers or make any other changes to the agenda without notice. All information is subject to change.

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800.803.2434 | 212.803.6093



### Agenda | TUESDAY, APRIL 20, 2010

## SCOPING OUT TERRAIN FROM THE SUMMIT...

Welcome to the **Employee Benefit News Compliance Summit 2010**. We've never convened a one-day event quite like this, because frankly there has never been a legal and regulatory environment quite like this.

The Obama administration, seeking to interpret and act on a mandate for change, set an ambitious course for health care reform – and set off one of the most contentious Capitol Hill debates in decades. As the smoke clears, and we continue to assess winners and losers, benefit managers must press on with their efforts to provide meaningful coverage at affordable rates. And at the same time, they must grapple with less publicized but high-impact laws and regulations affecting wellness programs, retirement plans and benefits administration.

For these reasons, we've climbed today's Summit so you can survey the legal and regulatory landscape spreading out before you in 2010. These will be nuts-and-bolts, shirtsleeve sessions led by experts who have closely studied both the magnitude and minutia of how government officials are affecting employee benefits. We thank you for ascending to this vantage point with us, and hope the view will help you address the many specific challenges confronting you this year.

**David Albertson**  
Editorial Director  
EMPLOYEE BENEFIT NEWS GROUP

## Conference Co-chairs



**David Albertson**  
Editorial Director  
EMPLOYEE BENEFIT NEWS GROUP



**Kelley Butler**  
Editor-in-Chief  
EMPLOYEE BENEFIT NEWS

### ASSOCIATION PARTNER:



## Sponsorship Opportunities

For more information on the sponsorship and exhibit opportunities at this event please check the website or contact Chris Frey at 212.803.6568 or christopher.frey@sourcemediacom.com

### 8:00 AM - 9:00 AM Continental Breakfast

#### 9:00 AM - 9:05 AM Summit Co-Chairs' Welcome Remarks

**David Albertson**, Editorial Director, EMPLOYEE BENEFIT NEWS GROUP  
**Kelley Butler**, Editor-in-Chief, EMPLOYEE BENEFIT NEWS

#### 9:05 AM - 10:00 AM KEYNOTE: Assessing the Fall Out of Employee Benefits in 2010

Get an insider's perspective on Capitol deliberations with one of the nation's top benefit consultants who regularly interacts with key national public policy makers. Scott Macey puts his 35 years of expertise in retirement and health benefits to the task with advice for benefit managers facing critical issues. Sort through the clutter of government regulatory and legislative changes in 2010. Find out if your existing benefit management initiatives are in danger and what measures you should be incorporating into your employee benefits procedures to maximize their effectiveness and minimize their risk. Learn about some likely developments to come...things you may not have read in the health reform headlines.



**Scott Macey**, Consultant

#### 10:00 AM - 11:00 AM Recent Developments in Health Care Reform

Despite efforts to pass a health care reform bill in Congress last year, due to recent changes in the membership of the Senate, prospects of passing a bi-partisan health care reform bill appear more daunting. Issues such as taxation of medical plan benefits, taxation of Medicare benefits and other insurance reforms may still be enacted in 2010. Learn how to keep track of all the proposed changes for employer-sponsored benefit plans in 2010 and in the future regarding:

- Taxation issues
- Related privacy issues concerning PHI, ePHI and the Massachusetts Data Protection rules.
- Update on status of current health care reform proposals



**Susan Nash**, Partner,  
MCDERMOTT WILL & EMERY

### 11:00 AM - 11:20 AM Morning Networking Break

#### 11:20 AM - 12:30 PM COBRA's Twists and Turns

Federal COBRA enrollments among subsidy-eligible former employees have increased 20% since March 2009. Obama recently inked legislation lengthens the duration of subsidies from nine to 15 months, and extends them to workers who lose jobs by Feb. 28, 2010. Initial approval of the subsidies generated a multitude of questions from employers, who still need help assessing the impact and coordinating administrative processes.



**Ouida Peterson**, VP of Education,  
CONEXIS

### 12:30 PM - 1:45 PM Lunch

#### 1:45 PM - 2:45 PM New Demands for 401(k) Administration

The recent economic crisis has made a huge impact on employee retirement plans and now requires better oversight, design and fee structures. Find out what you need to know most about:

- Recent Events in Fee Disclosure (DOL – 3 point Disclosure Initiative)
- Coming Regulations & Implications to Sponsors and Service Providers
- Getting Ready for “full fee disclosure”
- Determining “Fee Reasonableness”



**Wayne Bogosian**, Founder, President &  
Managing Director, THE PFE GROUP

#### 2:45 PM - 3:45 PM Practical Welfare Benefits Issues for 2010

Regardless of health care reform changes, employers are continually challenged with important welfare benefit issues. For example, in the Guidance under the Genetic Information Non-Discrimination Act, there are changes on rules for Health Risk Assessments and Wellness Programs. There's also regrouping after execution of HIPAA Business Associate Agreements, including any guidance issued by the Department of Health and Human Services. Employers need to be aware of:

- Grappling with GINA
- Open enrollment issues for 2011
- The trend towards allowing dependents to remain enrolled in employer medical plans from ages 26 through 31.
- Proposed Regulations impacting Flexible Benefit Plans
- New Mental Health Parity Regulations



**Frank Palmieri**, Partner, PALMIERI &  
EISENBERG

### 3:45 PM - 4:05 PM Afternoon Break

#### 4:05 PM - 5:25 PM Compliance Advisory Panel

Interdisciplinary advice from leading experts in various areas of employee benefits. Follow this lively discussion between an adviser/broker, accountant, attorney and third party administrator (TPA). Answers to your burning questions will be provided via this extended Q&A session with panelists.

**MODERATED BY:**  
**David Albertson**, Editorial Director, EMPLOYEE BENEFIT NEWS GROUP

#### PANELISTS:



**Gary Broder**, CPA, CPA, Senior Partner,  
SALIBELLO & BRODER LLP



**Ron Jerro**, CLU, REJ ASSOCIATES, INC.



**David O'Shea**, Director,  
SIGNIFICA BENEFIT SERVICES



**William Sweetnam**, Principal, GROOM  
LAW GROUP, CHARTERED

### 5:25 PM - 5:30 PM Closing Remarks

### 5:30 PM - 6:30 PM Cocktail Reception