

Events

ALI-CLE: Employee Benefit Plans of Tax-Exempt and Governmental Employers

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SERVICES

David Powell is Planning Co-Chair of the ALI-CLE program “Employee Benefit Plans of Tax-Exempt and Governmental Employers.” This program will take place on October 20-21, 2016 at Washington, DC. Benefit professionals from the private, non-profit, and governmental sectors will examine the impact of the latest legal changes to plan provisions and employer operations. Discussions will address:

- What the new rules on determination letters mean for establishing whether your retirement plan is “qualified”
- Whether your tax-exempt entity’s 457(f) plan has a substantial risk of forfeiture
- What the continued evolution of EPCRS means for fixing your retirement plan
- Disability plan claims procedures, evolving wellness program rules, and litigation – Are your welfare plans compliant?
- New HHS audit initiatives on HIPAA Privacy and Security
- An anticipated update to the mortality tables
- 417(e) lump sum payment provisions guidance
- Cadillac tax guidance
- Proposed regulations on lump sum payments to retirees in pay status
- New DOL audit initiatives
- The bankruptcy of government plans, such as in Detroit, California, and Puerto Rico
- Recent Circuit Court decisions on church plan status