

GROOM LAW GROUP

17th ANNUAL EMPLOYEE BENEFITS SEMINAR
The Ritz-Carlton, Washington DC
October 16, 2012

AGENDA

8:45 a.m. – 9:00 a.m.

Introductions/Welcome by John McGuiness

9:00 a.m. – 10:00 a.m.

Health Care Reform – Coming Soon!

- Exchanges Around the Corner
- Employer Mandate Guidance
- 2013-2014 Requirements for Plan Sponsors

Presenters: Chris Keller (Moderator), Jon Breyfogle,
Christy Tinnes, Brigen Winters

10:00 a.m. – 11:00 a.m.

Current PPA and IRS Voluntary Correction Developments

- Tackling the PPA Benefit Restrictions
- PPA Funding and De-Risking Options
- Expanded IRS Correction Program

Presenters: Lou Mazawey (Moderator), Kendall Daines,
Liz Dold, Mark Lofgren

11:00 a.m. – 11:15 a.m.

Break

11:15 a.m. – 12:45 p.m.

What's Hot at the DOL and in the Courts?

- DOL's Regulatory Initiatives and Post-Election Priorities
- DOL Investigative Priorities
- Fiduciary Litigation Update

Presenters: Steve Saxon (Moderator), Jim Cole, Jason Lee,
Rick Matta, Mike Prame

12:45 p.m. – 1:45 p.m.

Lunch – Mix and Mingle

AFTERNOON BREAKOUT SESSIONS

2:00 p.m. – 3:00 p.m.
Concurrent Sessions

Current Executive Compensation Issues

- 2012 IRS Guidance Under Sections 83 and 162(m)
- New PPACA Taxes Coming in 2013
- Correctable and Uncorrectable 409A Errors

Presenters: John McGuinness (Moderator), Jeff Kroh, Brigen Winters, Jeff Witt

ERISA Fiduciary Workshop

- Fee Disclosure – What did we learn?
- Plan Expenses – Approaches, issues and developments

Presenters: Roberta Ufford (Moderator), Jenny Eller, Tom Roberts, Alex Ryan

3:00 p.m. – 3:15 p.m.

Break

3:15 p.m. – 4:15 p.m.
Concurrent Sessions

Trends in Wellness and Health Incentives

- What's Allowed and What's Not
- What Works and What Doesn't

Presenters: Christy Tinnes (Moderator), Cheryl Hughes, Vivian Turner

International Benefits in the Spotlight

- Puerto Rico Plan Update
- Covering NRAs in Qualified Plans
- FATCA Guidance for Executives

Presenters: David Powell (Moderator), Juan Luis Alonso, David Levine

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Pre-Seminar Events – Monday, October 15, 2012

Health Care Reform Workshop

12:30 p.m. - 3:30 p.m.

The Ritz-Carlton Washington, D.C. – Salon IIIA

Key Issues Plan Sponsors Need to Tackle Right Now – Interactive session to discuss PPACA implementation and administrative issues and what the future holds.

Ask Groom Experts About PPACA – Roundtable discussion. You are encouraged to bring your PPACA questions or email them in advance to Caitlin Kottage at ckottage@groom.com

Women's Networking Event

4:00 p.m. - 5:30 p.m.

The Ritz-Carlton Washington, D.C. – Lobby Cafe

Please join Groom Law Group women for a fun and engaging networking event.

Cocktail Reception at the Office of Groom Law Group

6:00 p.m. – 8:00 p.m.

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