

Learn It, Live It, Love It:

Employee Benefits Boot Camp 2012

From health care and retirement benefits, to executive
compensation and much more:
A daylong course on benefits basics

Wednesday, April 18, 2012

8:00 a.m. to 4:30 p.m.

COBB GALLERIA CENTRE

Atlanta, Georgia



Sponsored by the Atlanta Chapter of:



WEB

Worldwide Employee
Benefits Network



WE WANT YOU! Benefits Boot Camp is a daylong training session that offers you a unique learning opportunity. Whether you are a new HR generalist or a seasoned benefits professional, Benefits Boot Camp provides all the basics you need. Use it for 101 knowledge or to brush up on areas you may not have worked in for awhile.

Experienced benefits professionals will lead comprehensive discussions of six core benefit areas: retirement plans, executive compensation, fiduciary duties, health plans, administrative practices, and welfare benefits. Each topic will be presented with an emphasis on “real world application” and all attendees will take home a detailed compilation of related materials for continued reference.

Benefits Boot Camp is the ideal opportunity for your company to make a meaningful and cost-effective investment in the education and training of its HR and benefits team. **SHRM and CE credits ARE available for this training.**

ABOUT WEB ATLANTA

Benefits Boot Camp is sponsored annually by the Atlanta Chapter of WEB, a national organization committed to fostering and supporting the ongoing growth and professional development of benefits professionals by providing educational meetings, publications and networking opportunities. Professionals from throughout the Southeast attend WEB Atlanta’s Benefits Boot Camp. This is the 10th annual event.

WEB Atlanta is the second largest chapter in the United States, and represents more than 25 professions and 30 areas of expertise in the pension and benefits industry. Our members include HR directors, administrators, wellness managers, consultants, attorneys, accountants, investment managers, and communications experts.

For more information about WEB, visit the national website: webnetwork.org. If you are interested in becoming a member in WEB Atlanta, please contact Kim Adler or Steve Smallidge at webatlantamembership@gmail.com. WEB offers a special price of \$75 for students and \$105 for government employees. Also, sponsorship opportunities are available. For more information on sponsorship, please contact Ken Bohrer at ken.bohrer@optimbenefits.com.

2012 Benefits Boot Camp Sponsors



2012 Benefits Boot Camp Overview

Registration begins at 8 am. Continental breakfast, snacks and lunch provided.

Health Plans

Speaker: David Benoit, General Counsel and Director of Compliance Services Swerdlin & Company

Discussion will include:

- Review of plan types (e.g., HMOs, PPOs, POS, indemnity plans)
- Funding, cost sharing, and compliance issues
- ERISA requirements, plans subject to ERISA
- COBRA continuation coverage
- HIPAA privacy rules
- GINA and the Mental Health and Substance Abuse Parity Act
- Health care reform

Welfare Benefits

Speaker: Michael Richerson, Director of Employer Sales, Benefitfocus

Discussion will include:

- Review of welfare benefits, including short-term disability, long-term disability, group term life, and dependent life insurance benefits
- Review of flexible spending accounts (health care and dependent care) compliance issues

Executive Compensation

Speaker: Frances-Ann Moran, Esq. of Regulatory & Compliance Legal Advisors by Sheffield and Moran, P.C.

Discussion will include:

- Common forms of nonqualified retirement and incentive programs for executives, as well as guidance on how to look for 409A issues in executive arrangements and programs
- Review of the general features of executive employment agreements and how they interact with benefit and incentive programs
- Design alternatives and uses of equity incentive plans
- Factors in selecting the appropriate nonqualified retirement plan design for the company

Retirement Plans

Speaker: Ilene H. Ferenczy, Esq. of The Law Offices of Ilene H. Ferenczy, LLC

Discussion will include:

- Requirements for a retirement plan to be qualified under Code Section 401(a)
- Advantages of a qualified plan
- Differences between qualified and non-qualified plans
- Review of defined contribution plans (including profit sharing plans, money purchase plans, pension plans, 401(k) plans, stock bonus plans and employee stock purchase plans)
- Review of defined benefit plans (including cash balance plans)
- Qualification requirements under the Internal Revenue Code and ERISA

Administrative Practices

Speaker: Jason Sheffield, Esq. of Blue Fuze Compliance, LLC

Discussion will include:

- Administrative issues faced by plan administrators
- Annual reporting requirements related to benefits
- Handling requests for loans, hardship withdrawals, and QDROs

Fiduciary Duties

*Speakers: Sam Choy, Esq. of McKenna, Long & Aldridge, LLP
Mark McCoy, Founder of Retirement Fund Management*

Discussion will include:

- Required responsibilities of plan administrators to ensure that employee benefit plans are operated in the best interest of participants
- Who is considered a fiduciary and
- What fiduciaries can and cannot do





Benefits Boot Camp

April 18, 2012
8 am to 4:30 pm
Cobb Galleria Centre

Registration Form

Yes! Please sign me up for Benefits Boot Camp 2012!

Name

Company

City

State

Zip

Email Address

Title

Address

Phone

Fax

The Cobb Galleria Centre is conveniently located in northwest Atlanta at the intersection of Interstates 75 and 285. Please visit www.cobbgalleria.com for directions.

SHRM & CE CREDITS ARE AVAILABLE FOR THIS SEMINAR

Payment Information



The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit.

Early Bird Registration (deadline: February 29, 2012)

- \$200

General Registration (deadline: March 31, 2012)

- \$250 for WEB members
- \$300 for non-members

Onsite Registration (and registrations received after March 31, 2012)

- \$350

To register online, go to: <http://www.webnetwork.org/chapteradmin/eventReview/viewEvent.cfm?eventid=1722>

To pay by check, make check payable to **WEB Atlanta**. Mail check and this registration form to Lydia Pochatko, 1941 Boone Place, Snellville, GA 30078.

*\$25 per person discount given when three or more participants from the same company register. If you have questions regarding Boot Camp, please contact Lydia Pochatko at 404.370.4377 or LydiaPochatko@AlliedHoldings.com

NO REFUNDS WILL BE GIVEN