http://www.wpbcportland.org/PDXSpringSeminar

Spring Into Benefits Planning May 13, 2015 One Page Summary

Session	Timeslot	Track	Title	Speaker	Title / Company
1	8:00	Keynote	**The Future of Employer-Sponsored Retirement and Health Plans**	Lynn Dudley	Senior VP, Global Retirement and Compensation Policy, / American Benefits Council
2	9:45	Health	An Overview of the new ACA Employer Reporting Requirements.	Sarah Friend	Employee Benefits Consultant / The Partners Group
3		Retirement	Understanding Social Security, Medicare and Government Benefits	Andrew Larson	Director of Retirement Education / Retirement Learning Center LLC
4		Professional	Networking 2.0: Build Credibility, Develop Relationships And Create Opportunities	Sheri Fitts	Founder and CEO/ ShoeFitts Marketing
5	11:00	Investments	The Empire Strikes Back: DOL Proposal Puts Investment Advisors on the Defensive!	Wally Miller	Attorney / Schwabe, Williamson & Wyatt
6		Health	The Cadillac Tax: What We Know Now (And What We Don't)	Christine Moehl	Attorney/ Saalfeld Griggs PC
7		Retirement	Variable Annuity Pension Plans: A Balanced Approach to Retirement Risk	Nina Lantz	Consulting Actuary/ Milliman
8	12:15	Lunch	**Retirement Vision 20/20: Prescription to Help Drive Better Outcomes**	Doug Fisher	Senior VP / Fidelity
9	1:45	DOL	Insight into Current Events at the Department of Labor – EBSA	Lynne McMennamin	Auditor, Office of the Chief Accountant /DOL - EBSA
10		Investments	Hard Wired to Fail" the reason so many intelligent people find investing so difficult	MacGregor Hall	President / Deschutes Investment Consulting
11		Retirement	Cash Balance plan design trends. A review of the latest trends in CB plan design, In particular using trust rate of return as the crediting rate.	Norman Levinrad	Actuary / Summit Actuarial Services
12	3:00	IRS	IRS Update and Recurring Operational Issues	Shannon Takizawa	Employee Plans Revenue Agent / IRS
13		Health	Private Healthcare Exchanges	Mikel Gray	Consulting Actuary/ Milliman
14		Retirement	Reflection in the Mirror: DC Plan Participants offer their perspectives and perceptions around retirement savings	Greg Koleno	Vice President / American Century

Session	Timeslot	Track	Title	Speaker	Title / Company
1	8:00	Keynote	**The Future of Employer-Sponsored Retirement and Health Plans**	Lynn Dudley	Senior VP, Global Retirement and Compensation Policy, / American Benefits Council
			Lynn directs the Council's advocacy efforts regarding retirement and compensation policy, including defined benefit and defined contribution plans and executive and non-qualified deferred compensation. Lynn also coordinates the Council's efforts and outreach in the international arena, including the Benefits Passport informational series. Lynn has held senior positions at the Council since 1991, including stints as vice president, retirement policy, vice president and senior counsel and senior vice president, policy. Prior to joining the Council, Lynn was a legal consultant for Sungard Employee Benefits Systems in Birmingham, Alabama. In addition, she was engaged in the private practice of law for several years with the law firm of Berkowitz, Lefkovitz, Isom and Kushner of Birmingham. After earning her undergraduate degree at Vanderbilt University, Lynn received a L.L.M. in taxation from the University of Florida in 1983 and a law degree from Cumberland School of Law, Samford University in 1982. Lynn is active in numerous information sharing organizations, is a fellow in the American College of Employee Benefits Counsel and a member of the Alabama and Georgia state bars. Lynn is a frequent speaker domestically and internationally on retirement and compensation policy issues. http://www.americanbenefitscouncil.org/about/ldudley.cfm		
2	9:45	Health	**Overview of the new ACA Employer Reporting Requirements. The objective of this presentation is to ensure that applicable large employers understand the purpose of the new IRS employer ACA reporting and specifically what they should be doing now to ensure your organization’s readiness to fulfill this new requirement. The presentation will address the requirements for both fully insured and self-funded employers**	Sarah Friend	Employee Benefits Consultant / The Partners Group
			Sarah Friend has worked in the health insurance industry for 19 years and specializes in working with large, complex employers. Before joining The Partners Group in 2007, Sarah worked with one of Oregon’s leading health plans in a variety of sales, operation and management positions Sarah graduated from Western Oregon University with a degree in Communication and Business.\ http://www.tpgrp.com/employee-benefits/employee-benefits-team/sarah-friend-portland/		

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3	9:45	Retirement	**Understanding Social Security, Medicare and Government Benefits** **Attendees will learn:** • **Practical knowledge about important topics that affect everyone and can have a profound impact on a retiree's benefits during retirement** • **Planning ideas to help maximize income and benefits for singles, couples, divorcees and widows/widowers** **Topics include:** • **Social Security** • **Medicare: Health care for retirees** • **The role of Medicare supplement (Medigap) policies**	Andrew Larson	Director of Retirement Education / Retirement Learning Center LLC

With 33 years of experience in the financial services industry, Andy is a respected authority, frequent lecturer and author on industry topics. Andy's background includes managing and consulting with major recordkeeping platforms, extensive product design for plan sponsors and advanced sales support for intermediaries who work with plans. As a retirement industry executive, he ran the recordkeeping and consulting practice for Universal Pensions, Inc. (UPI), and headed the BISYS Corporate University. He has served as an adjunct professor for the Central Lakes College system in Minnesota, and provides expert witness services on numerous industry topics. Andy is co-author of RLC's book, Retirement Resource Guide: Essential ERISA Education & Best Practices for Financial Advisors. He is a graduate of the University of St. Thomas in St. Paul, Minnesota, and maintains a Certified Pension Consultant (CPC) designation from the American Society of Pension Professionals and Actuaries.

http://www.retirementlc.com/pages/learning_center_faculty.html

Session	Timeslot	Track	Title	Speaker	Title / Company
4	9:45	Professional	**NETWORKING 2.0: BUILD CREDIBILITY, DEVELOP RELATIONSHIPS AND CREATE OPPORTUNITIES** **The expanding use of technology, the Internet and social media has shifted the way many individuals approach business. Just as people may search the web for information about companies, business connections use the same tools to research vendors, products, services and quite possibly new employees. While face-to-face relationships trump technology when it comes to creating meaningful connections, many professionals are moving online to supplement their face-to-face efforts. In this session, you will learn about using LinkedIn to support your efforts – for sales, service, connections, volunteer opportunities and more.** **We'll also conquer a few social media myths, learn the power of 'cyber sleuthing', and gather some simple and useful ways to use social networking, and LinkedIn in particular, in your day-to-day role.** **Attendees will leave with action items, ideas and tangible resources to launch an effective Networking 2.0 game plan—one that will help build credibility, develop relationships and stay connected!**	Sheri Fitts	Founder and CEO/ ShoeFitts Marketing
			With 24 years of industry experience in her pocket, Sheri collaborates with retirement plan advisors, third-party administrators, and financial service organizations to help them leverage marketing tools, social media strategy tactics, and meaningful connections. She has received awards and recognition from the Plan Sponsor Council of America, Pension and Investments; National Association of Government Defined Contribution Administrators; and the International Association of Business Communicators. http://www.shoefitts.com/sheri-fitts/		

Session	Timeslot	Track	Title	Speaker	Title / Company
5	11:00	Investments	**The Empire Strikes Back: DOL Proposal Puts Investment Advisors on the Defensive!**	Wally Miller	Attorney / Schwabe, Williamson & Wyatt

Wally Miller is a shareholder with Schwabe, Williamson & Wyatt, where he leads its Employee Benefits practice. He assists employers in complying with the myriad of laws governing retirement plans and other employee benefit programs. Mr. Miller has extensive knowledge and experience in matters involving qualified Section retirement plans, non-qualified deferred compensation plans and welfare benefits plans.

Mr. Miller is a recognized author and speaker, and he has served as a member of the Editorial Advisory Board of the Journal of Taxation of Employee Benefits. Mr. Miller is an active member of the Western Pension & Benefits Council (Former Chair of its Joint Council of Presidents (2007-2008), and of the IRS Pacific Coast Area Tax Exempt and Government Entities (TE/GE) Council.

For his work in employee benefits, Mr. Miller is listed in the Best Lawyers in America and SuperLawyers He has also been elected as a Fellow of the American College of Employee Benefits Counsel.

http://www.schwabe.com/showattorney.aspx?Show=11934

Session	Timeslot	Track	Title	Speaker	Title / Company
6	11:00	Health	**The Cadillac Tax: What We Know Now (And What We Don't)**	Christine Moehl	Attorney/ Saalfeld Griggs PC

Christine Moehl is a partner in the business law firm of Saalfeld Griggs, PC located in Salem, Oregon. Her practice is limited to legal matters related to the Employee Retirement Income Security Act (ERISA), including both health care plans and qualified retirement plans.

Christine assists public and private sector plan sponsors, third-party administrators and investment professionals in all aspects of establishing and operating employee benefit plans. She is particularly adept at designing health and retirement plans to fit the individual needs of her clients, as well as assisting plan sponsors and fiduciaries in complying with ERISA, the Internal Revenue Code, and Health Care Reform. She also has extensive experience in guiding clients through the process of correcting plan administration errors through the IRS Employee Plans Correction Resolution System ("EPCRS"). She is also a frequent speaker on Health Care Reform and other employee benefit topics.

Christine received her law degree in 2004 from Lewis and Clark Law School, where she graduated cum laude and was a member of the law review. She received her undergraduate degree in 1999 from Lewis and Clark College.

http://www.sglaw.com/lawyer/christine-m-moehl/

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Session	Timeslot	Track	Title	Speaker	Title / Company
7	11:00	Retirement	**Variable Annuity Pension Plans: A Balanced Approach to Retirement Risk** **This session will introduce Variable Annuity Pension Plans (VAPPs) as an alternative to the traditional defined benefit and defined contribution plan. This shared risk structure addresses the main risks employees face during retirement while providing stable and predictable costs for the employer.**	Nina Lantz	Consulting Actuary/ Milliman
			Nina Lantz is a Principal and Consulting Actuary with the Portland, Oregon office of Milliman, Inc., a leading international actuarial and consulting firm. For over 20 years, she has worked on a wide variety of pension and retiree medical plans in the corporate, multiemployer and government sectors. Nina graduated with a Bachelor of Science degree in mathematics from Oregon State University, is an Associate of the Society of Actuaries, an Enrolled Actuary under ERISA and a member of the American Academy of Actuaries. http://us.milliman.com/Consultants/?cid=a4d8bc9b7f000001008dcfef37f60e9f		
8	12:15	Lunch	**Retirement Vision 20/20: Prescription to Help Drive Better Outcomes** **Are your workplace benefits designed to keep up with changing times? Five economic and political factors are coalescing to make this a critical question today: plan designs are aging, today's workforce may span five generations, health care is becoming consumer-driven, and many policymakers think our private retirement system is not delivering on its promise. Doug will offer a strategic framework to evaluate your benefit designs, starting with four simple questions.** Doug Fisher leads Fidelity's policy development and thought leadership on retirement, health and welfare benefit issues, and developing Fidelity's point of view on legislative and regulatory developments in the areas of benefit design and delivery. Doug established Fidelity's first federal government relations team and workplace thought leadership group.	Doug Fisher	Senior VP / Fidelity

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			Before joining Fidelity, Doug served as tax counsel to the U.S. Senate Finance Committee and was involved in writing the pension, health and insurance provisions of the Small Business Job Protection Act of 1996; the Balanced Budget Act of 1997, including the Roth IRA, Simple retirement plan, medical savings account (predecessor to the health savings account [HSA]); and the Health Insurance Portability and Accountability Act of 1996 (HIPAA). https://www.linkedin.com/in/fidelitydougfisher		
9	1:45	DOL	**Insight into Current Events at the Department of Labor – EBSA**	Lynne McMennamin	Auditor, Office of the Chief Accountant /DOL - EBSA
			Over 20 years of auditing employee benefit plans of all types, providing guidance to clients on implementation of new regulations and best practices in the industry. Served on the AICPA's Employee Benefit Plan Audit Quality Center's Executive Committee from 2008 to 2011. Prior to that served 4 years on the AICPA's Expert Panel for Employee Benefit Plans. Additionally has nearly 20 years of experience in working with government contractors, performing audits, reviews, and compilations. Specialties:401(k), Profit Sharing, Money Purchase Plans, 403(b), ESOP, David Bacon Act Plans, Traditional Defined Benefit Plans, Cash Balance Plans, Health & Welfare Plans for single-employer, multiple employer, and multi-employer sponsors https://www.linkedin.com/pub/lynne-mcmennamin-cpa/4/ba0/b9a		
10	1:45	Investments	**Hard Wired to Fail" the reason so many intelligent people find investing so difficult** Our emotional makeup creates overwhelming roadblocks to investing success. Understanding these barriers can help you and your employees build a financially secure future. MacGregor Hall will share what he has learned in over 25 years of working with 401k plan participants and individual investors.	MacGregor Hall	President / Deschutes Investment Consulting

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			MacGregor has spent the last 20+ years managing corporate and individual retirement plans. Deschutes Investment Consulting is a fee only financial firm under his guidance BS degree in Finance from the University of Oregon. Certified Investment Management Analyst (CIMA) designation through the Investment Management Consultants Association/Wharton Executive Education Program. A former principal of Copper Mountain Trust and Advisors. http://www.deschutesinvestment.com/team/macgregor-hall/		
11	1:45	Retirement	**Cash Balance plan design trends.** **A review of the latest trends in CB plan design,** **In particular using trust rate of return as the crediting rate.**	Norman Levinrad	Actuary / Summit Actuarial Services
			Norman is President of Summit Benefit & Actuarial Services. He is an EA, a CPC, an FSPA and a MAAA. He is a regular speaker at actuarial conferences on plan design and other issues, and has published many articles on various pension topics. http://www.summitbenefit.com/NormanBio.pdf		
12	3:00	IRS	**IRS Update and Recurring Operational Issues**	Shannon Takizawa	Employee Plans Revenue Agent / IRS
			Frequent Speaker to Pacific Northwest retirement professional Day to Day job, performing ERISA compliance exams		

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13	3:00	Health	**Private Healthcare Exchanges**	Mikel Gray	Actuary/ Milliman
			Fellow, Society of Actuaries; Member, American Academy of Actuaries Education: BS, Mathematics and Economics, Portland State University Mike leads Milliman's Northwest Health & Group Benefits practice. Mike has more than 30 years' experience in employee health and group benefits consulting. He has recently worked with large national firms to formulate a long-term plan to navigate the impact of healthcare reform, using tactics including private exchanges or full-replacement high-deductible health plans (HDHPs). He also helps clients negotiate and create benefit offerings with accountable care organizations. http://us.milliman.com/Consultants/?cid=6d0f14cb73127a00172010d8badeed7d		
14	3:00	Retirement	**Reflection in the Mirror: DC Plan Participants offer their perspectives and perceptions around retirement savings**	Greg Koleno	Vice President / American Century
			As part of the DCIO team at American Century Investments Greg works with retirement advisors, platform wholesalers and TPAs providing tools and products that enable them to increase business and market share. A graduate of the University of Portland and in his 20+ year career has specialtized in: development of corporate strategy; marketing plan execution; business development/strategic alliances; mergers and acquisitions https://www.linkedin.com/in/gregkoleno		