

Spring Into Benefits Planning

WP&BC Portland Spring Seminar
May 13, 2015
Oregon Convention Center

This event is made possible with support from our generous sponsor organizations:



Becker Capital Management



For information on future events, and to download materials after the seminar, please visit: www.wpbcpportland.org

MORNING SCHEDULE

7:30

REGISTRATION

Registration table opens; continental breakfast available

8:00

KEYNOTE PRESENTATION

The Future of Employer-Sponsored Retirement and Health Plans

Keynote Speaker: Lynn Dudley
American Benefits Council

The employer-sponsored retirement and health benefits system is at a cross-roads. Join us for a discussion of what is on the policy horizon for employer-sponsored benefits and how the benefits community is responding.

BREAKOUT SESSIONS

Understanding Social Security, Medicare and Government Benefits
Speaker: Andrew Larson
Retirement Learning Center LLC

An Overview of the New ACA Employer Reporting Requirements
Speaker: Sarah Friend
The Partners Group

9:45

Networking 2.0: Build Credibility, Develop Relationships and Create Opportunities
Speaker: Sheri Fitts
ShoeFitts Marketing

BREAKOUT SESSIONS

The Empire Strikes Back: DOL Proposal Puts Investment Advisors on the Defensive!
Speaker: Walter Miller
Schwabe, Williamson & Wyatt

The Cadillac Tax: What We Know (And What We Don't)
Speaker: Christine Moehl
Saalfeld Griggs PC

11:00

Variable Annuity Pension Plans: A Balanced Approach to Retirement Risk
Speaker: Nina Lantz
Milliman

AFTERNOON SCHEDULE

12:15

LUNCH PRESENTATION

Retirement Vision 20/20:
Prescription to Help Drive Better Outcomes

Featured Speaker: Doug Fisher
Fidelity

Are your workplace benefits designed to keep up with changing times? Doug will offer a strategic framework to evaluate your benefit designs, starting with four simple questions.

BREAKOUT SESSIONS

Insight into Current Events at the Department of Labor – EBSA
Speaker: Lynne McMennamin
U.S. Department of Labor

Hard Wired to Fail: Why So Many Intelligent People Find Investing So Difficult
Speaker: MacGregor Hall
Deschutes Investment Consulting

1:45

Cash Balance Plan Design Trends: Including Using Trust Rate of Return as the Crediting Rate
Speaker: Norman Levinrad
Summit Actuarial Services

4:00

HOSTED BAR RECEPTION

Stay to network and engage in the benefits planning discussion!

BREAKOUT SESSIONS

IRS Update and Recurring Operational Issues
Speaker: Shannon Takizawa
Internal Revenue Service

Private Healthcare Exchanges
Speaker: Mikel Gray
Milliman

3:00

Reflection in the Mirror: Participants Offer Their Perspectives and Perceptions Around Retirement Savings
Speaker: Greg Koleno
American Century