




HEALTH, WELFARE, & BENEFITS SYMPOSIUM

Monday, November 4, 2013

8:30 AM – 12:00 PM Pacific Time

The Standard Insurance Center | Basement Auditorium | 900 SW 5th Avenue | Portland, OR 97204

8:30 AM – 8:45 AM	Welcome and Update WP&BC Portland Chapter Board Chair	Paul Petroff Actuary	
8:45 AM – 9:00 AM	Recent Developments	Kara Backus Attorney	
9:00 AM – 9:15 AM	Portland Sick Leave Ordinance	Melissa Healy Attorney	
9:15 AM – 9:30 AM	Break	Coffee and Pastries	
9:30 AM – 10:30 AM	Defining the DOMA Domain Almost Everyone Will be Affected	Thomas Kramer Attorney	
<i>Various relationships may be treated as marriages for state and federal tax and benefits purposes. No simple rule applies, despite recent IRS guidance. We will look at the options and requirements facing employers and their advisors</i>			
10:30 AM – 10:45 AM	Break	Refreshments	
10:45 AM – 11:45 AM	Updates on the Affordable Care Act	Bethany Bacci Attorney	
		Jennifer Morgan Business Readiness Expert	

WiFi Available During Symposium using the DLINK Network

Presentation materials available for viewing or download at:

<http://wpbcportland.org/Symposium1104>

PRESENTER BIOGRAPHIES

Kara Backus
Attorney



(503) 778-2181
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Kara Backus practices exclusively in the areas of employee benefits and executive compensation. She has experience with qualified retirement plans under the Internal Revenue Code and ERISA, including plan design and drafting, monitoring compliance with new legislation and regulatory guidance, and interacting with governmental agencies (IRS and DOL) on behalf of clients. She advises and represents clients with respect to regulatory self-correction programs.

Kara also assists clients with the design, implementation and regulatory compliance of welfare benefit plans under ERISA, including group health plans, cafeteria plans and dependent care plans. She negotiates the settlement of welfare benefit claims and advises clients on COBRA and HIPAA issues. Kara advises clients on compliance with ERISA's benefit claim procedure, reporting and disclosure, fiduciary responsibility, and prohibited transaction requirements.

University of Southern California, J.D., 2008
Amherst College, B.A., English and German, 1996

Full bio available at: <http://www.lanepowell.com/14978/kara-backus/>

Melissa Healy
Attorney



(503) 294-9263
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Melissa Healy is a litigation associate practicing in the Stoel Rives' Labor and Employment group. Her practice focuses on providing advice in employment law matters, representing management in employment litigation, and providing traditional labor support to employers.

Prior to joining Stoel Rives, Melissa was an associate at Barran Liebman LLP (2010-2012), and a judicial law clerk for Justice W. Scott Bales of the Arizona Supreme Court (2009-2010).

University of Arizona, J.D., 2009, magna cum laude
University of Oregon, B.A., Political Science, 2004, summa cum laude with departmental honors

Full bio available at: <http://www.stoel.com/showbio.aspx?Show=9386>

Thomas Kramer
Attorney



(503) 721-2655
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Tom Kramer is an employee benefits lawyer at Bullard Law in Portland. He was an English major, so lacked the science knowledge for medical school and lacked the personality to become an actuary. Naturally, then, he chose law school, since it didn't require either science knowledge or personality. He was a year behind Justice Sonia Sotomayor in law school and in the same class with Anita Hill. Tom said he feels old when asked if he knew Bill or Hillary Clinton in law school.

Tom and his wife and dog moved to Portland in 1980, right after Mt. St. Helens blew the first time and before the next five eruptions that summer. They wondered, while cleaning ash out of their gutters, whether this move was crazy. But, Portland grew on them and the ash pile didn't and he has been practicing law here ever since, dealing with qualified and nonqualified retirement plans and, as today, health and welfare plans.

Yale University, J.D., 1980
Claremont Men's College, B.A., 1976, summa cum laude
University of St. Andrews, 1974-1975

Full bio available at: <http://www.bullardlaw.com/people/?id=60>

PRESENTER BIOGRAPHIES

Bethany Bacci
Attorney



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Bethany Bacci is a partner in the Stoel Rives' Portland office who specializes in various aspects of employee benefits law and is a frequent speaker on health care reform. Bethany assists public and private employers in achieving their human capital and compensation objectives with advice on a wide array of tax and fiduciary matters affecting qualified and nonqualified retirement plans, health and welfare plans, and executive compensation. Bethany advises on the implications of the ongoing changes in health care reform for both employers and employer-sponsored plans and the regulatory issues associated with maintaining welfare benefit programs. She has represented plan sponsors in devising, negotiating, and implementing changes to employee benefit plans to address tax qualification issues, aligning plan design with business objectives, and mitigating risk through use of the IRS and Department of Labor (DOL) correction procedures.

When not focusing on her benefits practice, Bethany serves as president of Stoel Rives' Coaching and Mentoring Committee (Portland) and represents pro bono clients on a variety of issues through the Stoel Rives night clinic and Multnomah County Legal Aid. In 2008, Bethany won the firm's pro bono award in recognition of her service. Bethany was also listed in The Best Lawyers in America and Oregon Super Lawyers Rising Starts.

Northwestern School of Law of Lewis & Clark College, J.D., cum laude,
Stanford University, B.A.

Full bio available at: <http://www.stoel.com/showbio.aspx?Show=226>

Jennifer Morgan
Business Readiness Expert



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Jennifer Morgan is the business lead for the employer program with Cover Oregon which involves program development, operational planning and implementation. Jennifer serves as a Subject Matter Expert for the Employer Program and the Individual/Family program through Cover Oregon.

Prior to joining Cover Oregon, Jennifer enjoyed her role as a Benefit Consultant working with a diverse group of individuals and employers. Jennifer has over fifteen years of health insurance industry experience working with individuals and businesses.

Jennifer is a licensed Life and Health Insurance Agent and Consultant in Oregon and holds a professional designation of Registered Health Underwriter.
