



The Western Pension & Benefits Conference, Los Angeles Chapter

Presents

Spring Summit 2008

Wednesday, April 30, 2008

dancing with the experts



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The WPBC Spring Summit will feature a full day of presentations by experts in benefits, including government speakers. They will provide practical information and useful tips on how to effectively deal with these and other new developments, as well as covering some of the most significant ongoing issues facing plan sponsors and others

Keynote Speaker: Dr. Keith Richmond, Former CA State Legislator
"Retirement and Healthcare"

Continuing Education (CE) credits for JBEA, NIPA, NASBA, MCLE.

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Pickwick Garden Conference Center

1001 Riverside Dr., Burbank, California 91506

Phone: 818.845.5300

Seminar Program & Registration Information

dancing with the experts

Dance Card



8:00 - 8:30

Continental Breakfast and Registration

8:30 - 8:45

Welcome and Introduction to Spring Summit 2008

8:45 - 9:25

“Education Mambo” - Opening General Session

“An Obligation to Educate?”

with Steve Vernon

9:25 - 9:45

“Dirty Dancing” - Legislative and Regulatory Updates in Compensation and Benefits'

9:50 - 11:05

Breakout Session I

a) DB/DC Beginning Dance

Basics of DB/DC Design

b) DOL DISCO

DOL Update and Panel

c) Choreography of a 401(k) Plan

401(k) Plan Design Updates

d) Fiduciary Foxtrot

Fiduciary Issues for Plan Sponsors

11:05 - 11:20

Morning Break

11:20 - 12:35

Breakout Session II

a) The Fiduciary Line Dance

Basic Fiduciary Issues

b) Waltzing with Compliance

IRS Compliance and Audit

c) Paso Doble Practice

Participant Education

d) Healthcare Hip Hop

Healthcare Legislative Issues for CA

12:35 - 2:00

Luncheon and Keynote Presentation with Dr. Keith Richmond

“Retirement and Healthcare” - Dr. Richmond is a former 3 Time CA State Legislator from So. California. He is a physician and Entrepreneur. During his time in Sacramento he was involved in most of the State initiatives involving Pensions, The Retirement System and Healthcare. Get ready for a “Master Class!”

2:00 - 3:15

Breakout Session III

a) Health and Welfare Jazz Dance

Basics of Health and Welfare Plans

b) The ‘LEGAL’ Quickstep

ERISA Case Law

c) PPA Polka

PPA - A Year in Review

d) The 409A Salsa

409A Rules and Regs

3:15 - 3:30

Afternoon Break

3:30 - 4:45

“The Last Dance” - Breakout Session IV

4:45 - 6:00

Cocktail Party



Western Pension & Benefits Conference, Los Angeles Chapter

Spring Summit 2008

WEDNESDAY, APRIL 30, 2008 ● 8:00 A.M. - 6:00 P.M.

IMPORTANT INFORMATION

LOCATION/HOTEL ACCOMMODATIONS: Pickwick Gardens Conference Center, 1001 Riverside Dr., Burbank, CA 91506
Phone: 818.845.5300

PARKING: Complimentary

DRESS ATTIRE: Dress will be Business Casual. Everyone has a different temperature comfort zone, so be prepared with a light jacket or a sweater for cooler meeting rooms.

PAYMENT/CONFIRMATION: All registrations must be accompanied by a check or credit card information for the full registration fee. Checks are to be in U.S. funds and payable to WP&BC LA.

Registrations will not be processed without full payment.

SEMINAR MATERIALS: Badges and program materials must be picked up at the WP&BC registration desk at the seminar.

CANCELLATIONS: Notification of cancellation must be submitted to WP&BC headquarters in writing. Cancellations received by Wednesday, April 23, 2008 will be subject to a \$50 cancellation charge. No refunds will be made for cancellations received after April 23, 2008. Substitutions are allowed at any time but must be submitted in writing.

QUESTIONS? If you have questions regarding registration or payment, call WP&BC headquarters, 818.846.1129

2008 WP&BC Spring Summit Registration Form

Name _____ Title _____

Company _____

Address _____

City _____ State _____ Zip _____

Phone _____ FAX _____

Email _____

Seminar Fee:

L.A. or O.C. WP&BC Members, or attendees from Sponsor Companies

Non-Members

Pre-Registered

\$225

Pre-Registered

\$295*

After April 8

\$250

After April 8

\$320*

At Door

\$275

At Door

\$350*

**Includes Membership for remainder of fiscal year*

Credit Card Number _____ Expires _____ VCode _____

Billing Zip _____ Billing Street _____ Amount to be Charged _____

Name on Card _____ Signature _____

You may FAX your Completed Registration with Credit Card Information to
818-843-7423 or

If paying by check, please mail your payment in full to:
WP&BC Spring Summit
210 N. Glenoaks Blvd., Suite C, Burbank, CA 91502
Phone: 818-846-1129 FAX: 818-843-7423



**WP&BC Spring Summit Wednesday, April 30, 2008 at the Pickwick Gardens
Conference Center in Burbank, off of the 5 and 134 freeways.**

Spring Summit 2008 Agenda

8:00 - 8:30 am	Registration - Continental Breakfast	12:35 - 2:00 pm	Luncheon & Keynote Speaker - Retirement and Healthcare - <i>Dr. Keith Richmond</i>
8:30 - 8:45 am	Welcome	2:00 - 3:15 pm	<u>BREAKOUT SESSION III</u>
8:45 - 9:25 am	Education Mambo with <i>Steve Vernon</i> - "An Obligation to Educate?"		a) Health and Welfare Jazz Dance - <i>Basics of Health and Welfare Plans</i>
9:25 - 9:45 am	A Washington Update		b) The "LEGAL" Quickstep - <i>ERISA Case Law</i>
9:50 - 11:05 am	<u>BREAKOUT SESSION I</u>		c) PPA Polka - <i>PPA - A Year in Review</i>
	a) DB/DC Beginning Dance - <i>Basics of DB/DC Design</i>		d) The 409A Salsa - <i>409A Rules and Regs</i>
	b) DOL DISCO - <i>DOL Update and Panel</i>	3:15 - 3:30 pm	Afternoon Break
	c) Choreography of a 401(k) Plan - <i>401(k) Plan Updates</i>	3:30 - 4:45 pm	<u>BREAKOUT SESSION IV</u>
	d) Fiduciary Foxtrot - <i>Fiduciary Issues for Plan Sponsors</i>		"The Last Dance" - <i>A Panel Discussion "Swinging with your Peers"</i>
11:05 - 11:20 am	Morning Break	4:45 - 6:00 p.m.	Cocktail Party - <i>Latest Developments in Networking and Socializing</i>
11:20 - 12:35 pm	<u>BREAKOUT SESSION II</u>		
	a) The Fiduciary Line Dance - <i>Basic Fiduciary Issues</i>		
	b) Waltzing with Compliance- <i>IRS Compliance and Audit</i>		
	c) Paso Doble Practice - <i>Participant Education</i>		
	d) Healthcare Hip Hop - <i>Healthcare Legislative Issues for California</i>		

Western Pension & Benefits Conference

210 N. Glenoaks Blvd. Ste C
Burbank, CA 91502

Return Service Requested



2008 Spring Summit
Keynote by Dr. Keith Richmond,
Former CA State Legislator

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