

THURSDAY—MAY 15th

12:30 p.m.–1:20 p.m.

- ***401(k) Fees & The New Disclosure Mandates***

Craig Hoffman
Vice President and General Counsel
SunGard Relius LLC
Jacksonville, Florida

1:30 p.m.–2:20 p.m., Break Out Session

- ***Issues Commonly Discovered in a DOL Audit***

Steve Eischen
Regional Director
Department of Labor/EBSA
Kansas City, MO

- ***Automatic Enrollment—The New Frontier***

Joan McDonagh
Manager 401(k) Technical Resources
Great-West Retirement Services
Glendale, Wisconsin

2:30 p.m.–3:20 p.m.

- ***Examinations Update***

Craig Bellanger
Gulf Coast Area Manager
Employee Plan Examinations
Internal Revenue Service
New Orleans, Louisiana

3:30 p.m.–4:20 p.m., Break Out Session

- ***Counting Compensation After Severance***

Craig Hoffman
Vice President and General Counsel
SunGard Relius LLC
Jacksonville, Florida

- ***Meeting Your Fiduciary Responsibilities***

Joan McDonagh
Manager 401(k) Technical Resources
Great-West Retirement Services
Glendale, Wisconsin

4:30 p.m.–5:20 p.m.

- ***DOL EBSA Regulatory Update***

Bradford Campbell
Assistant Secretary
Employee Benefits Security Administration
U.S. Department of Labor
Washington, D.C.

FRIDAY—MAY 16th

7:30 a.m.

- ***Breakfast***

7:55 a.m.–8:45 a.m.

- ***Industry Trends-Big News Current and Future***

Nancy Webman
Editor
Pensions & Investments
Chicago, Illinois

9:00 a.m.–10:15 a.m.

- ***The Importance of Selecting the Right Plan Default Investment (How to Properly Select a QDIA)***

Bruce Ashton
Partner
Reish Luftman Reicher & Cohen
Los Angeles, California

10:30 a.m.–12:00 p.m.

- ***Roundtable Session***
All Speakers

12:00 p.m.

- ***End of Conference***

