



# 32nd Annual Cincinnati Employee Benefits Conference

**Friday, June 7, 2019**

8:30 a.m. Registration & Continental Breakfast

9 a.m. to 4:30 p.m. Program

**CLE Credit**

6.0 Hours CLE Credit, Including 1.0 Hour of Attorney Professional Conduct

7.0 Hours CPE Credit

**Location:**

Westin Hotel, 21 East Fifth Street, Downtown Cincinnati



## Agenda

**8:30 a.m. Registration, Breakfast & Networking**

**8:55 a.m. Welcome & Opening Remarks**

**9 a.m. ERISA Update**

Brian Furgala, Esq., CPC, QPA,  
*Wolters Kluwer-ftwilliam.com & TAGdata,  
Orlando FL*

(materials prepared by Sal Tripodi of *TriPension*;  
includes 15-minute break)

**12:15 p.m. Group Luncheon** (included in registration)

**1:15 p.m. IRS Presentation**

*Moderator*  
David A. Whaley, Esq., *Thompson Hine LLP,  
Cincinnati, OH*

William Anderson, Esq., *Supervisory Tax Law  
Specialist, IRS, Cincinnati, OH*

Milo Atlas and Angelo Noe, *EP Pre-Approved Plan  
Coordinators, IRS, Cincinnati, OH*

**2:15 p.m. Service Provider Contracting**

Laura M. Nolen, Esq., *Ingersoll Rand Inc.,  
Davidson, NC*

Laura A. Ryan, Esq., *Thompson Hine LLP,  
Cincinnati, OH*

**3:15 p.m. Refreshment & Networking Break**

**3:30 p.m. Hot Topics in Fiduciary Litigation and  
Managing Fiduciary Responsibility**

Brian J. Lamb, Esq., *Thompson Hine LLP,  
Cleveland, OH*

**4:30 p.m. Adjourn**

### Conference Planning Committee

Rodney E. Driscoll, Esq., *Conduent, Inc.*  
Beth A. Mandel, Esq., *Thompson Hine LLP*  
Bernadine C. Topazio, Esq., *Convergys Corporation*

## Handouts

Seminar handouts will be provided in electronic format. The e-handout will be available on the CBA website three days prior to the seminar for download to your device. Registered attendees will receive an email with instructions on downloading the materials. Please confirm your current email address on the registration form to assure you receive this communication. Also, please bring your fully-charged device to the seminar with the downloaded materials. Free WiFi will be available.

A binder with a full set of printed materials may be pre-ordered for an additional \$25.

## CLE Credit

This program qualifies for CLE credit as follows:

**Ohio:** 6.0 Hours, including 1.0 Hour of Attorney Professional Conduct Credit

**Indiana & Pennsylvania:** 6.0 Hours, including 1.0 Hour Ethics Credit

**Kentucky:** 6.0 Hours, including 1.0 Hour Ethics *pending*

At the attendee's request, documentation will be provided for self-reporting to other jurisdictions.

## CPE Credit

The Cincinnati Bar Association is registered with the Ohio Accountancy Board. This program is approved for 7.0 Hours CPE Credit

## Location

Westin Hotel  
21 East Fifth Street  
Cincinnati, Ohio 45202

## Overnight Accommodations

A block of rooms is being held at Westin on the evenings of June 6 & 7 at the discounted group rate of \$229 per night plus tax (internet included) through May 14 based on availability. Call (800) WESTIN 1 and mention the "CBA Cincinnati Employee Benefits Conference" room block to book your room.

## Cancellations / Substitutions

Cancellations received by June 4 will be refunded less a \$35 processing fee. Individuals who cancel after June 4 will receive electronic course materials in lieu of a refund. Substitutions will be accepted at any time.

## Registration

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<b>CLE All Access Pass holders and Cornerstone Members</b>	\$0
<b>Government Employee</b>	\$170
<b>Non-Government Employee</b>	
By May 25: \$335	After May 25: \$385
<b>Law Student Half Day</b>	\$25
<b>Law Student Full Day</b>	\$50

Your registration includes a full day of conference admission, electronic course handouts, wireless internet access, breakfast, lunch and refreshment breaks.

### Optional Additions: Print Handouts

(All attendees will receive handouts in electronic format.)

☐ Yes, please provide a full set of printed handouts for an additional \$25.

Name(s) \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Enclosed is my check in the amount of \$   
made payable to the Cincinnati Bar Association.

Please charge my credit card the amount of \$

☐ Visa ☐ MasterCard ☐ Discover ☐ Am. Express

Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

Cardholder Signature \_\_\_\_\_

### Return the registration form, with payment to:

Cincinnati Bar Association  
225 East Sixth Street, 2nd Floor  
Cincinnati, OH 45202-3209  
ATTN: CLE Department  
Fax: (513) 381-0528  
Online at: [www.cincybar.org](http://www.cincybar.org)

### For more information contact:

CLE Department, Cincinnati Bar Association  
Phone: (513) 699-4028

*If you have any special needs addressed by the Americans with Disabilities Act, please let us know at least one week prior to the seminar.*

*Registrants, instructors, exhibitors and guests attending CBA meetings agree they may be photographed during the event. Photographic materials are the sole property of the CBA, and the CBA reserves the right to use attendees' names and likenesses in promotional materials without providing monetary compensation*