



THE NUTS AND BOLTS OF REPORTING AND DISCLOSURE RULES FOR EMPLOYEE BENEFIT PLANS

(With Emphasis on Old and New Rules That May Catch Your Clients by Surprise)

So Many Rules, So Little Time

A 90-minute Teleconference

Tuesday, AUGUST 30, 2011

1:00-2:30 pm ET / 12:00-1:30 pm CT / 11:00 am-12:30 pm MT / 10:00 am-11:30 am PT

The employee benefits world is exploding with existing and new reporting requirements, so much so that Employee Benefits advisors can barely keep up. This 90-minute program starts off with a big-picture overview and drills down quickly to the issues of the day regarding reporting and disclosure. No longer are disclosures primarily limited to private employer, ERISA sponsored plans, but of recent include church plans and governmental entities on both the pension and health benefits side. While DOL, IRS, PBGC, and HHS pronouncements that touch on this area are addressed in general, the panel attempts to identify a number of potholes and a few landmines that may catch your client off guard. A few examples of areas covered are:

- Recent developments in Form 5500 Schedule C reporting
- Often-overlooked SEC reporting and disclosure requirements
- Part 7 Requirements, including 4980B, 4980D, 4980E, and 4980G penalties and self-reporting excise taxes on Form 8928
- Opt-out options available to governmental entities
- Impact of most recent Supreme Court decision (*Cigna Corp. v. Amara*) on Plan document/SPD disclosures
- Health benefit claims disclosures required by the most recent DOL, IRS and HHS pronouncements, including impact of grandfathering, insured vs. self-funded, vs. private, vs. non-federal governmental

Moderator: Bernard V. Kearse III, *Bernard V. Kearse III PC*, Atlanta, GA

Speakers: Cynthia Marcotte Stamer, *Cynthia Marcotte Stamer PC*, Addison, TX
Tara Silver-Malyska, *Grant Thornton LLP*, Dallas, TX
Eugene M. Holmes, *Proskauer Rose LLP*, Washington, DC

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- \$175 All other registrants
- \$75 Each additional participant (sharing a line with the primary registrant)

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