

Added Bonus: Special IRS/DOL lunch session on Tuesday
sponsored by Workers in Employee Benefits (WEB)

May 25 - 27, 1999
Dallas, Texas

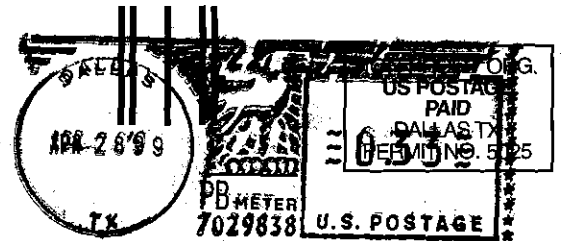
FUNDAMENTALS AND ADVANCED ISSUES
OF EMPLOYEE BENEFITS

Sponsors a Three-Day Seminar



The Dallas/Fort Worth Chapter of

D/FW Chapter
PO Box 1013
Dallas TX 75221-9954



50/14015013/438213 DFN1
CYNTHIA M. STAMER
PARTNER
LOCKE LIDDELL & SAPP
#2200
2200 ROSS AVE
DALLAS TX 75201-6776

PROGRAM SCHEDULE

Retirement Plan Fundamentals

Tuesday, May 25, 1999

8:00-8:30 a.m. Registration	10:45-11:45 a.m. Session 3 Defined Contribution Plans	2:00-3:00 p.m. Session 5 Compliance
8:30-9:30 a.m. Session 1	<ul style="list-style-type: none"> • Fundamental Pension Plan Concepts • Plan Design Alternatives • Plan Financial and Tax Considerations • Recent Trends 	<ul style="list-style-type: none"> • ERISA Requirements • IRS Regulations • PBGC/Plan Termination • Participant Disclosure • Filing for Determination
<ul style="list-style-type: none"> • Introduction to Retirement Plans • Purpose of Qualified Plans • Oversight of Qualified Plans • Protection of Benefits • Trends and Projections <p style="text-align: right;"><i>Speaker: Brennan Reilly</i></p>	11:45-1:00 p.m. WEB Lunch	3:00-3:15 p.m. Break
9:30-9:45 a.m. Break	1:00-2:00 p.m. Session 4 Investments & Asset Management	3:15-4:15 p.m. Session 6 Current Issues
9:45-10:45 a.m. Session 2 Defined Benefit Plans	<ul style="list-style-type: none"> • Risk • How to Meet Financial Goals • Investment Allocation Changes • Investment Returns <p style="text-align: right;"><i>Speaker: Carolyn Cosgriff East</i></p>	<ul style="list-style-type: none"> • RS/DOL Initiatives • Social Security Reform • Technology & Compliance • Current Legislative Proposals <p style="text-align: right;"><i>Speakers: Phil Bush, Ed Razim</i></p>
<ul style="list-style-type: none"> • Fundamentals • Plan Design • Plan Distribution Issues • Administration Issues <p style="text-align: right;"><i>Speaker: Clarence Bayer</i></p>		

Welfare Plan Fundamentals

Wednesday, May 26, 1999

8:00-8:30 a.m. Registration	10:45-11:45 a.m. Session 3 Legal Environment of Plans	2:00-3:00 p.m. Session 5 Group Life and Disability Plans
8:30-9:30 a.m. Session 1 Introduction to Health & Welfare Plans	<ul style="list-style-type: none"> • Fundamentals • Claim Procedures • Assets & Trust Requirements • Reporting & Disclosure • COBRA, FMLA, HIPAA, etc. <p style="text-align: right;"><i>Speaker: Cindy Stamer</i></p>	<ul style="list-style-type: none"> • Need for coverage • Type of Benefits Available • Plan Design • Cost Factors • Trends <p style="text-align: right;"><i>Speaker: Adam Pannell</i></p>
9:30-9:45 a.m. Break	11:45-1:00 p.m. Lunch	3:00-3:15 p.m. Break
9:45-10:45 a.m. Session 2 Plan Design & Funding	1:00-2:00 p.m. Session 4 Flexible Benefits	3:15-4:15 p.m. Session 6 Current Issues
<ul style="list-style-type: none"> • Self funded plans • Types of Funding Arrangements • Choosing a Funding Arrangement • Effect of Funding Design on the Employer/Employee <p style="text-align: right;"><i>Speaker: Chris Shaw</i></p>	<ul style="list-style-type: none"> • What exactly is Flex? • Design Elements • Pricing and Controls • Communication • Administration <p style="text-align: right;"><i>Speaker: Mike Whitney</i></p>	<ul style="list-style-type: none"> • Pharmacy Benefit Management • Other Current Topics <p style="text-align: right;"><i>Speaker: Joe Taylor</i></p>

Advanced Issues in Employee Benefits

Thursday, May 27, 1999

8:00-8:30 a.m.

Registration

8:30-10:00 a.m.

Session 1

Integrated Disability Management

- Plan Design (goals & objectives)
- Advantages / Disadvantages
- Expected Cost Savings
- Claim Models

Speakers: April Cox, Ken Malcolmson,
Brian Kelley, Karen Kendall

10:00-10:15 a.m.

Break

10:15-11:45 a.m.

Session 2

Intranet / Internet for HR
Communication

- What's Up On the Web
- Strengths & Weaknesses
- What the Leaders are Doing
- How to get Started

Speaker: Dennis Ackley

SEMINAR FACULTY

Ackley, Dennis: Watson Wyatt, head,
employee education and
communication consulting practice

Bayer, Clarence: Watson Wyatt, Actuary

Bush, Phil: Locke Liddell & Sapp LLP,
attorney

Cox, April: EDS, Manager of Member
Disability and Life Services

East, Carolyn Cosgriff: Moneta
Investment Consulting, Inc., owner

Furney, Nancy Wyman: Winstead,
Sechrest & Minick, P.C., Attorney

Lindaahl, Rik D.: Watson Wyatt, consultant
on Health and Welfare

Kelley, Brian: Liberty Mutual, Vice
President & Manager, Integrated
Disability management

Kendall, Karen: Frito Lay, Inc., Director of
Benefits

Malcolmson, Ken S.: Towers Perrin, Unit
Leader for Health and Welfare Practice

Pannell, Adam: Liberty Mutual Insurance
Group, Executive Disability Sales

Reilly, Brennan: Winstead Sechrest &
Minick, P.C., attorney

Razim, Ed: Locke Liddell & Sapp LLP,
associate attorney

Shaw, Chris: Lockton Dunning Benefit
Company, Vice president and
consultant

Stamer, Cindy: Locke Liddell & Sapp LLP,
attorney

Taylor, Joe: William M. Mercer, Inc.,
associate

Thacker, Valerie: Fidelity Institutional
Retirement Services Company,
Program Manager, Industry and
Regulatory Training

Whitney, T. Michael: Flexible Benefit
Group, Inc., owner and consultant

Three-Day Seminar

FUNDAMENTALS AND ADVANCED ISSUES OF EMPLOYEE BENEFITS

May 25 - 27, 1999

**JC Penney Training Center
12700 Park Central Place, lower level**

The Dallas / Ft. Worth Chapter of the International Society of Certified Employee Benefit Specialists presents a three-day program on the fundamentals and advanced issues of health, welfare, and retirement plans.

The fundamentals portion of the seminar (Tuesday and Wednesday) includes presentations by experienced professionals on topics that are basic to understanding retirement, health and welfare plans. This is an excellent opportunity for new entrants to the employee benefits field to learn the fundamentals.

For veteran employee benefit professionals, the fundamentals portion of the seminar serves as a refresher overview. The advanced portion (Thursday ½ day) of the program focuses on two current issues that are affecting employee benefits professionals: integration of disability benefit plans and using technology for the communication / administration of benefits.

***NOTE: CE credits available for Insurance and Accounting
Don't delay – register today!
For more information, contact Cindy Williams at (214) 720-2114.***

REGISTRATION FORM (Please print)

Name: _____

Title: _____

Company: _____

Address: _____

City / Zip _____

Telephone: _____

Email: _____

Make checks payable and mail to:
DFW ISCEBS
P O Box 1013 Dallas 75221-1013

Please check the day(s) you will attend:
 Tuesday Wednesday Thursday

REGISTRATION DEADLINE: May 19, 1999

DATE:	May 25 - 27, 1999
TIME:	8:30 a.m. - 4:30 p.m. 25th & 26th 8:00 a.m. - 11:45 a.m. 27th
LOCATION:	JC Penney Training Center 12700 Park Central Place, lower level
COST:	Tuesday* & Wednesday (Fundamentals) \$200 if same person attends both days \$125 for single day OR 3 or more people from same firm on same day *Tuesday's fee includes WEB lunch session
	Thursday (Advanced) \$75
	\$50 for materials only

CANCELLATION POLICY: Cancellations must be received no later than May 19, 1999 to receive a refund of all but \$50 of your registration fee (per person). Substitutes are accepted.