



Employee Benefit Plans Compliance

Liability Workshop

Presented By:
Texas Council Risk Management Fund

September 16, 1999
The Menger Hotel
San Antonio, Texas





Employee Benefits Plans Compliance

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Thursday, September 16, 1999

Agenda

*Continental Breakfast
from 7:45 a.m. to 8:30 a.m.*

- 8:30 a.m. Introductions and Comments**
George Patterson, Director of Operations, Burke Center and Chair, Risk Managers Advisory Committee, Texas Council Risk Management Fund

**Mr. E. Philip Bush and Ms. Cynthia Marcotte Stamer, Attorneys
Locke Liddell & Sapp, L.L.P., will present the following topics:**

- 8:45 a.m. Overview of Qualified and Non-Qualified Plans Available
to Governmental Employers**

Break 9:45 a.m.

- 10:00 a.m. Reporting and Disclosure and Other Operational Compliance
Requirements for Retirement Plans**

Break 10:45 a.m.

- 11:00 a.m. Frequently Encountered Errors in Operating of Government
Retirement Plans - How to Fix What's Broken**

*Luncheon Buffet
12:00 noon to 1:00 p.m.
Menger Lobby*

- 1:00 p.m. Cafeteria Plan Design and Compliance Requirements**

Break 2:00 p.m.

- 2:15 p.m. Fiduciary Duties for Government Plan Trustees and Plan Administrators**

- 3:00 p.m. Executive Deferred Compensation - What Works, What Doesn't**

- 3:30 p.m. Adjourn**





About the Speakers

E. Philip Bush is a partner with the law firm Locke Liddell & Sapp, L.L.P. Mr. Bush is a board certified specialist in tax law and has practiced in the areas of employee benefits and executive compensation for over twenty years. He has extensive experience in advising employers and plan fiduciaries in plan design and compliance matters.

Mr. Bush is a member of the adjunct faculty at SMU School of Law where he has lectured since 1989. He is a Vice Chair of the Employee Benefits Committee of the American Bar Association Health Law Section. He is a member of the American Bar Association Joint Committee on Employee Benefits which serves as the principal liaison group for attorneys to the IRS, Department of Labor, and other federal agencies which regulate employee benefit plans. Mr. Bush is a frequent author and speaker on employee benefits and executive compensation topics at continuing professional education programs.

Cynthia Marcotte Stamer is a partner with the law firm Locke Liddell & Sapp, L.L.P. Ms. Stamer is board certified in labor and employment law. She is a member of the Editorial Advisory Board and author for The Bureau of National Affairs Health Care Portfolio Series. Ms. Stamer practices in the areas of employee benefits, health care, human resources, and labor and employment law. As a primary focus of her practice, Ms. Stamer helps clients design, administer, and defend cost-effective employee benefit, employment, safety and worker's compensation, and other programs, policies, and procedures to meet their budgetary and other business objectives.

Ms. Stamer recently authored chapters on workers' compensation, employee benefits, and The Texas Payday Act for a book entitled "Texas Employment Law." She also is the author of numerous other publications and regularly serves as an adjunct faculty member of several college, university, and seminar faculties.





Employee Benefit Plans Compliance

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