



# ASPPA Benefits Council™

New York

## Everything You Wanted to Know About Cash Balance Plans!

**Thursday, August 13, 2009**

8:00 a.m. – 11:30 a.m.

(Including intermission

and questions and answer period)

Continental Breakfast served at 8:00 a.m.

The Association of the Bar  
City of New York  
42 West 44th St  
New York, NY 10036

3 CE credits are available  
for EAs\*, CPAs and ASPPA members.

**RSVP by August 6, 2009**

\*The final decision as to the number and type of JBEA credits rests solely with the Joint Board for the Enrollment of Actuaries.

### GUEST SPEAKER:

**Kevin J. Donovan,  
CPA, EA, MSPA**

Kevin Donovan is an Enrolled Actuary and Certified Public Accountant. He is a Member of ASPPA, the College of Pension Actuaries (COPA), the American Institute of Certified Public Accountants (AICPA), and the National Institute of Pension Administrators (NIPA).

Kevin is a frequent lecturer on qualified retirement plans. He has been a Contributing Editor and Editorial Advisor to the Journal of Pension Benefits and has been published in The Tax Advisor, the Journal of Taxation of Employee Benefits, the Benefit Law Journal, and the ASPPA Journal.

### Special Offer:

Attendees will receive a 15% discount certificate for purchase of the Cash Balance Plan Answer Book. There will be a raffle drawing for one copy of the book.

The cost for ASPPA members is \$75, ABC member non-ASPPA members is \$85 and non-ABC members is \$125.

Please complete the meeting reservation form below and send with payment to the ABC of New York  
c/o Judy Lynch, QPA | Economic Pension Services, Inc | 333 Seventh Ave. | New York, NY 10001 | F: 212.760.0172  
Make checks payable to the ABC of New York

Name of Person(s) Attending: \_\_\_\_\_

Member of:

ASPPA

ABC

Yes

Yes

Yes

Yes

Yes

Yes

**TOTAL AMOUNT  
ENCLOSED:**

Company: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Method of Payment:  Check  American Express  Discover  MasterCard  Visa

Credit Card#: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_

For further information, please contact 973.439.0200 (daytime) or 201.739.9183 (evening) or e-mail information@abcny.net.

If you do not wish to receive additional e-mail or fax communications from the ASPPA Benefits Council of New York, please contact jhalloran@asppa.org or call 703.516.9300.



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New York

## Be a part of it all...Locally!

- Convenient and economical way to stay current in the pension field
- Continuing education (CE) credit for most programs
- Access to ASPPA's library of information: publications, articles and topics from ASPPA Conferences
- Access to nationally-known speakers in the pension and employee benefits field
- Discounts on ASPPA national membership
- Discounts on *ASPPA asap* subscription service
- A way to have your voice heard in Washington, DC

Annual membership dues **July 31** through **December 31, 2009**

Individual member of ASPPA: **\$25.00**  
 Individual non-ASPPA member: **\$37.50**  
 Corporate ABC membership: **\$62.50**

Total payment of \$\_\_\_\_\_ enclosed.

### MEMBERSHIP APPLICATION

(Complete one form for each individual or corporate membership)

Please indicate type of Membership  Individual  Corporate  New  Renewal

Your contact information will not be shared with anyone outside of ASPPA. Your home contact information will be used in the event that we are unable to contact you at your place of business and will also be used to track the congressional districts in which you reside.

Salutation \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Suffix (Jr., Sr., etc.) \_\_\_\_\_

Professional Designations (CFP, EA, etc.) \_\_\_\_\_ Birth Date (mm/dd/yyyy)\* \_\_\_\_\_ Title/Position Category\*\* \_\_\_\_\_

Business Name \_\_\_\_\_ Business Type\*\*\* \_\_\_\_\_

Business Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Business Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Check  Credit Card #: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Signature: \_\_\_\_\_

\*Your initials and birth date will be used as your unique identifier in our database. If you are not comfortable disclosing your age, please provide the actual month and day with the year rounded to the nearest decade (i.e. 1950).  
 \*\*Position Categories: Accountant, Actuary, Attorney, Executive/Officer, Manager/Admin, Manager/Marketing, Manager/Product Sales, Manager/Technical, Staff/Admin, Staff/Marketing, Staff Product Sales, Staff/Technical, Other.  
 \*\*\*Business Types: Accounting, Actuarial/Employee Benefits Consulting, Bank/S&L, Computer/Software, Educational, Insurance, Investment Advisory, Law, Recordkeeping, TPA, Other.

Please return your completed application with dues payment to ASPPA Benefits Council of New York  
 c/o Judy Lynch, QPA | Economic Group Pension Services, Inc. | 333 Seventh Ave. | New York, NY 10001 | F: 212.760.0172  
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