ASPPA Benefits Council™
New England

Update on 403(b) Plans

Wednesday
June 17, 2009

8:00 a.m. - 10:00 a.m.
Registration and Breakfast:
8:00 a.m.- 8:20 a.m.
Presentation: 8:20 a.m. - 10:00 a.m.

Westin Waltham, Boston
70 Third Avenue
Waltham, MA 02451
Ph: 781.290.5600

Parking
& Materials are included

RSVP by Wednesday June 10, 2009

GUEST SPEAKER:

Richard A. Hochman, APM

McKay Hochman Company

Richard A. Hochman, President and COO of Mckay Hochman, Inc. (www.mhco.com), is an attorney with an extensive background in the tax and employee benefits fields. He supervises a team of attorneys and consultants in the design, drafting, and support of prototype and custom documents for financial institutions, brokerage firms, insurance companies, pension consultants, and plan sponsors. As a member of the firm's training faculty, he regularly participates as an instructor in continuing education programs across the country.

Mr. Hochman provides written commentary and testimony in Washington, D.C., on regulatory issues in matters relating to qualified retirement plans on behalf of clients. Rich is a member of ASPPA's board of directors and has served on the Government Affairs Committee. He is co-chair of the ASPPA Annual Conference for 2009.

The cost to attend the workshop is $40 for ASPPA members, $50 for ABC of New England members and $70 for non-members.

Program Summary:

Nearly 6 months into life with the first update to the 403(b) regulations in decades, practitioners are facing new challenges in documenting and administering these plans that have, in many cases, been neglected for years. Service-providers that have shied away from 403(b) plans are now getting into the game. Plans with multiple vendors must now share information to ensure compliance with applicable limits. Consultants must educate tax-exempt entities on plan document and reporting requirements that have historically had little or no application for them. Many large plans will have to be audited for the first time, creating a challenge for CPAs who must find a way to establish the baseline for their review. In this session, Rich Hochman will discuss these issues and more.

2 hours of ASPPA CE credits available

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

ASPPA Benefits Council of New England | c/o Sentinel Benefits Group, Inc.
55 Walkers Brook Drive, Suite 100 | Reading, MA 01867
If paying by credit card, you may e-mail this form to Amy Sheridan at asheridan@sandw.com or fax to 781.213.7397.

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If you are a corporate member of the ABC of New England, then all associates pay member rates. For payment at the door, add $10 per registrant.

	Rate per Person		# of People		Total Cost
Member of ASPPA	$40	x	________	$	________
Member of the ABC of New England	$50	x	________	$	________
Non-Member	$70	x	________	$	________

Names of Registrants (include professional credentials and ASPPA member ID, as applicable)

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55 Walkers Brook Drive, Suite 100 | Reading, MA 01867
If paying by credit card, you may e-mail this form to Amy Sheridan at asheridan@sandw.com or fax to 781.213.7397.
For further information, please call Adam Pozek QKA, QPFC at 781.914.1296 or Ellen Houston, QPA, QKA at 781.914.1297.