



Getting Ready for the 2009 Form 5500 and EFAST2

Tuesday, October 20, 2009

11:30 a.m. Registration

11:30 a.m. - 12:30 p.m. Lunch provided

12:30 p.m. - 4:30 p.m. Presentation

Fort Wayne Marriott
305 East Washington Center Rd.
Fort Wayne, IN 46825
Tel: 260.484.0411

4 CE credits available

**RSVP by
October 15, 2009**

Janice M. Wegesin, CPC, QPA

JMW Consulting, Inc., Petoskey, MI

Janice is the president of JMW Consulting, Inc., in Petoskey, MI, which is a firm that specializes in compliance and design matters associated with qualified retirement plans. The company has a focus on employee welfare benefit programs as well as an emphasis in reporting and disclosure. Janice has earned the CPC and the QPA credentials from ASPPA and is an Enrolled Agent licensed to practice before the IRS.

She was the 1998 recipient of ASPPA's Educator's Award and the 2006 recipient of the ASPPA Harry T. Eidson Founder's Award. Janice also received NIPA's Lifetime Achievement Award in 2006 and is their annual conference program chair. She is a past member of the IRS's Information Reporting Program Advisory Committee and is the author of the *Form 5500 Preparer's Manual*. She maintains the Web site form5500help.com, and is a senior advisor to ASPPA's Government Affairs committee.

Topics for the presentation include:

- E-Filing from the plan sponsor's perspective
- Schedule C and Schedule A – including what gets reported where/direct vs. indirect compensation
- Changes to the 2009 forms
- 403(b) plan filings

This meeting will also include the annual board meeting with board nominations for 2010.

Cost for attendance is \$50

Please complete the meeting reservation form below and send with payment to Clare Householder, QKA, ABC Meetings Chair
Baden Retirement Plan Services | 6920 Pointe Inverness Way, Ste. 300 | Fort Wayne, IN 46804
Make checks payable to the ABC of Northern Indiana.

Name of Person(s) Attending	E-mail Address	Member of:	ASPPA?	ABC?
_____	_____		Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
_____	_____		Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
_____	_____		Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
_____	_____		Yes <input type="checkbox"/>	Yes <input type="checkbox"/>

Company: _____

Address: _____ City, State & Zip: _____

Telephone: _____ Fax: _____

E-mail addresses must be provided, as all conference material will be mailed by October 16th to the attendees.
For additional information, please contact Clare Householder, QKA, at 260.969.2662 or e-mail clare.householder@badenrps.com.
If you do not wish to receive additional e-mail or fax communications from the ASPPA Benefits Council of Northern Indiana, please contact jhalloran@asppa.org or call 703.516.9300.