



ASPPA Benefits Council™

Dallas/Fort Worth

Full-Day Workshop Featuring Stephen Forbes

Tuesday, September 22, 2009

7:30 a.m. Breakfast

8:00 a.m. – 3:30 p.m. Presentation
Lunch and Free Parking Included

Park City Club
5956 Sherry Lane
Suite 1700
Dallas, TX 75225
214.373.0756

Cost for DFW ABC members is \$150 and \$250 for non-members.
DFW ABC membership is separate from ASPPA membership.

Door prizes include vouchers for the *ERISA Outline Book*, registration for an ASPPA conference at early registration member price, ABC of DFW meeting registration and/or annual dues, and gift cards.

Qualifies for 6 ASPPA CE credits and 3 JBEA core credits. The final decision as to the number and type of JBEA credits rests solely with the Joint Board for the Enrollment of Actuaries.

RSVP by September 17, 2009

Stephen W. Forbes, JD, LLM,
Vice President, Denver Division,
Sungard Relius

A graduate of George Washington University Law Center, Steve joined SunGard Relius in 1998 with the PPD asset acquisition. Before joining Pension Publications of Denver (PPD) in 1988, Steve was a Tax Law Specialist with the national office of the Internal Revenue Service, Employee Plans Division, where he was a final reviewer for the Prototype Program, drafted Revenue Rulings, Revenue Procedures and Notices and participated in several treasury regulation committees. He also taught training classes to IRS Tax Law Specialists.

Steve was formerly an Adjunct Professor (Qualified Deferred Compensation), Graduate Tax Program, University of Denver College of Law. He conducts many SunGard Corbel seminars, including the ERISA Workshop, prototype, 401(k), 403(b) and private in-house seminars. Steve is also the author of *The 5500 Filing Guide* and a contributing author of *The Pension Library*.

This full-day workshop featuring Stephen Forbes of Sungard Relius will cover the following topics of current interest: safe harbor 401(k) plan design options and changes to safe harbor 401(k) plan rules, cross testing plan designs and troubleshooting, cash balance and DB/DC combination plans and 403(b) plan terminations, transfers, exchanges, written plan requirements and plan corrections.

Please complete the meeting reservation form below and mail or fax with payment to the ABC of Dallas/Fort Worth at the address or fax number below. Make checks payable to the ABC of Dallas/Fort Worth.

Please charge 2009 ABC dues (\$75)

Name of Person Attending: _____ Member of ABC? Yes No

Company: _____

E-mail: _____

Telephone: _____ Fax: _____

Method of Payment: Check American Express Discover MasterCard Visa

Name (as it appears on card): _____

Credit Card #: _____ Expiration Date: _____

Signature: _____

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