

Automatic Enrollment: What You Need to Know



The eleventh webcast
in the 2007
webcast series

Presented by: Rhonda Migdail, Sr. Technical Advisor, IRS, and Adam C. Pozek, QKA, QPFC, Vice President, Sentinel Benefits Group, Inc.

December 4, 2007

2:00 p.m. – 3:40 p.m. Eastern
1:00 p.m. – 2:40 p.m. Central
12:00 p.m. – 1:40 p.m. Mountain
11:00 a.m. – 12:40 p.m. Pacific

Open registration for the live show until
December 3, 2007

What's the Topic?

Researchers have estimated that PPA's provisions on automatic enrollment will add more than \$2 trillion to participant accounts over the next 15 years but many questions remain on exactly how these provisions can be implemented and what the administrative impact will be. This session will review the rules to help assess the pros and cons of automatic enrollment plan designs and to ensure proper coordination between the various service providers from administrator to recordkeeper to payroll vendor.

Join Rhonda Migdail, Senior Technical Advisor to Director, Employee Plans, Internal Revenue Service, and Adam C. Pozek, QKA, QPFC, Vice President, Sentinel Benefits Group, Inc., in a discussion of:

- General provisions for eligible automatic enrollment arrangements
- New annual notice requirements
- Hidden compliance traps for the unwary
- Optional automatic enrollment safe harbor provisions
- And much more!

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Final QDIA Regulations: The Wait is Over!



The twelfth webcast
in the 2007
webcast series

Presented by: Kristen Zarenko, Esq., Sr. Pension Law Specialist, EBSA, DOL, and Stephanie Napier, APM, Vice President and Sr. Trust Counsel, Marshall & Ilsley Trust Company, N.A.

December 5, 2007

2:00 p.m. – 3:40 p.m. Eastern
1:00 p.m. – 2:40 p.m. Central
12:00 p.m. – 1:40 p.m. Mountain
11:00 a.m. – 12:40 p.m. Pacific

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December 3, 2007

What's the Topic?

On October 24, the Department of Labor (DOL) published final regulations defining a "qualified default investment alternative" under the PPA. What conditions must be satisfied to obtain fiduciary relief for investing participants' accounts in your plan's default investment? What does this mean for you? This session will include a review of the provisions of the long-anticipated final QDIA regulations and a discussion of some of the comments the DOL received on its proposed regulation.

Join Kristen Zarenko, Esq., DOL, and Stephanie Napier, APM, Marshall & Ilsley Trust Company, N.A., in a discussion of:

- Investment alternatives that made the final QDIA cut
- Procedures that plans must follow when selecting a QDIA
- Other factors to consider when choosing a QDIA
- Notices and other information that plans must send to participants
- Transfer and redemption limitations that will apply to the QDIA
- And much more!

Register for both webcasts on December 4th and 5th and receive a \$50 discount!

Register by completing this form

Complete this form and fax it to 703.516.9308. You will receive confirmation and detailed instructions via e-mail about a week prior to the show. For more information, including the equipment that is required to successfully participate, please visit www.asppa.org/webcast.

Automatic Enrollment: What You Need to Know

Live on December 4

(Registration Deadline: 12/3/07)

Recorded available December 12

(Registration Deadline: 12/31/08)

Final QDIA Regulations: The Wait is Over!

Live on December 5

(Registration Deadline: 12/3/07)

Recorded available December 12

(Registration Deadline: 12/31/08)

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