2008 Western Benefits Conference

The Best of Both Worlds **July 13-16, 2008**

Seattle Sheraton and Washington State Convention & Trade Center
Seattle, WA

☐ SPON ☐ EPERU ☐ EXSPO	For ASPPA Use

REGISTRATION FORM

Step One - Registrant Information

Please register only one person per form. All fields are required - please type or print legibly.

First Name: ____________________ Last Name: ____________________ MI: ______

Name for Badge: ____________________ Designations: ____________________

Title: ____

Company: ____

Address: ____

City: ____________________ State: __________ Zip: ____________________

Phone: ____________________ Fax: ____________________

Email: ____

Please note that the information printed above for Badge Name, Company, City and State will appear on your conference badge exactly as stated.

If the address above is different from the mailing label, does this signify a change of address to be updated in your participant record?
☐ Yes, please change my address ☐ No

Step Two - Additional Information *(check all that apply)*

☐ ASPPA Member ☐ WP&BC Member (Chapter: ____________________) ☐ Member of Both
☐ Member of Neither ☐ Plan Sponsor ☐ Government Employee

☐ This is my first Western Benefits Conference

Please check dietary requirements (if applicable): ☐ Kosher ☐ Vegetarian ☐ Other: ____________________

If you require special accomodations due to a disability, please specify: ____________________

Step Three - Payment

Check one of the following (payment must accompany this form)

☐ Sponsor Complimentary Registration	$ 0 (SPON)
☐ Upgrade booth-only registration to full conference registration	$595 (EPERU)
☐ Additional full conference registration	$895 (EXSPO)

☐ Check Payment: Check Number: ______________

Credit Card: ☐ Visa ☐ MasterCard ☐ American Express ☐ Discover

Card Number: ________________________________ Exp. Date: ______________

Cardholder's Name: ____

Signature: ____

Please complete page 2 of this registration form.

2008 Western Benefits Conference

NAME:______________________________

The Best of Both Worlds — July 13-16, 2008

Please indicate the sessions you expect to attend. You may attend any session in any track during any particular time slot. Completing this form helps us assign rooms for each session based on expected attendance.

Step Four - Session Selections

MONDAY, JULY 14

11:15 a.m. - 12:30 p.m.

- ☐ Session 1: Reasons to Review Your Recordkeepiong Arrangement and Vendor Search Best Practices (Repeated as Session 50)
- ☐ Session 2: Calculating Benefits
- ☐ Session 3: De-accumulation of Participant Benefits
- ☐ Session 4: Non-Qualified Plans - What's So Special About Them?
- ☐ Session 5: ACAs, EACAs and QACAs: Oh My!
- ☐ Session 6: ERISA Litigation Update (Repeated as Session 54)
- ☐ Session 7: Blue Plate Special: The Proposed Cafeteria Plan Rules

2:15 p.m. - 3:30 p.m.

- ☐ Session 8: Phased Retirement
- ☐ Session 9: PPA Funding Part I
- ☐ Session 10: Qualified Default Investment Alternatives
- ☐ Session 11: Understanding 401(k) Fees
- ☐ Session 12: Cash Balance Plans for Non-Actuaries
- ☐ Session 13: 409A - End-Game Strategies
- ☐ Session 14: Total Replacement HSA Plan - The Journey (So Far)

4:00 p.m. - 5:15 p.m.

- ☐ Session 15: Mergers, Acquisitions and Spin-Offs
- ☐ Session 16: PPA Funding Part II
- ☐ Session 17: Fee Disclosure and Revenue Sharing: New Rules and Practical Implications (Repeated as Session 52)
- ☐ Session 18: Fiduciary Basics - ERISA 101 and More
- ☐ Session 19: ASPPA Recordkeeper Certification: Your Seal of Excellence
- ☐ Session 20: 403(b) Regulatory Update
- ☐ Session 21: Creating a Culture of Wellness: Best Practices for a Results-Oriented Program

TUESDAY, JULY 15

8:30 a.m. - 9:45 a.m.

- ☐ Session 22: Measuring and Disclosing Retirement Plan Costs (Repeated as Session 55)
- ☐ Session 23: 2008 Form 5500 Schedule SB
- ☐ Session 24: Fiduciary Worst Practices (Repeated as Session 57)
- ☐ Session 25: Fundamentals for Health and Welfare Plans
- ☐ Session 26: Terminating vs. Freezing a Plan: What's the Difference?
- ☐ Session 27: When Tax Shelters Masquerade as Employee Benefit Plans - or Vice Versa
- ☐ Session 28: Assuring Optimal Management of Prescription Drug Benefits

10:15 a.m. - 11:30 a.m.

- ☐ Session 29: Planning to Comply - Developing an Effective Plan Governance Program
- ☐ Session 30: Benefit Restrictions and Notices
- ☐ Session 31: Securing America's Retirement Through DC Plans
- ☐ Session 32: Fundamentals of Defined Benefit Plans
- ☐ Session 33: DC Plan Design after PPA
- ☐ Session 34: The Paperless Office: Issues & Answers
- ☐ Session 35: Domestic Partner and Same-Sex Spouse Benefits - What Should Employers Do?

TUESDAY, JULY 15

1:45 p.m. - 3:00 p.m.

- ☐ Session 36: What Advice Can You Give Your Participants About Retirement?
- ☐ Session 37: Post PPA Small Plan Designs
- ☐ Session 38: The Curious Case of the Target Date Strategy
- ☐ Session 39: Open Forum: The Future of Retirement Plans/Industry
- ☐ Session 40: Distribution Rules
- ☐ Session 41: Plan Notices
- ☐ Session 42: Hot Topics Involving the Financing and Design of Retiree Medical Benefits

3:30 p.m. - 4:45 p.m.

- ☐ Session 43: Set it and Forget it? A Discussion of Auto-Enrollment and Auto-increases
- ☐ Session 44: Cash Balance Plan Design for Mid-Sized and Large Employers
- ☐ Session 45: Guaranteed Income for Life Solutions in 401(k) Plans: The Next Big Thing?
- ☐ Session 46: A Better Way to Prepare for Retirement
- ☐ Session 47: Government Questions & Answers - Defined Contribution
- ☐ Session 48: Plan Corrections
- ☐ Session 49: How Regional Coalitions are Increasing Health Care Value

WEDNESDAY, JULY 16

8:30 a.m. - 9:45 a.m.

- ☐ Session 50: Reasons to Review Your Recordkeeping Arrangement and Vendor Search Best Practices (Repeat of Session 1)
- ☐ Session 51: IRS Questions & Answers--Defined Benefits
- ☐ Session 52: Fee Disclosure and Revenue Sharing: New Rules and Practical Implications (Repeat of Session 17)
- ☐ Session 53: Open Forum: Defined Contribution Plans
- ☐ Session 54: ERISA Litigation Update (Repeat of Session 6)

10:00 a.m. - 11:15 a.m.

- ☐ Session 55: Measuring and Disclosing Retirement Plan Costs (Repeat of Session 22)
- ☐ Session 56: Open Forum: Defined Benefit Plans
- ☐ Session 57: Fiduciary Worst Practices (Repeat of Session 24)
- ☐ Session 58: 401(k) Testing, Including Safe Harbor and Roth
- ☐ Session 59: Open Forum: Health & Welfare Plans

REGISTRATION FORM