

EDUCATIONAL CASSETTE PROGRAM

CONCURRENT WORKSHOPS

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(1) USING THE WEB FOR BUSINESS PURPOSES AND MARKET DEVELOPMENT— S. Derrin Watson, APM, PIX
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(2) LEGISLATIVE UPDATE— Benjamin F. Spater, APM, Trucker Huss
- 01ASPA-420
(3) E-NOTICES AND OTHER ELECTRONIC APPROACHES TO EMPLOYEE COMMUNICATIONS AND TRANSACTIONS— Andy Anderson, Hewitt Associates, LLC
- 01ASPA-430
(4) READING AN UNFAMILIAR PLAN DOCUMENT—WHERE TO LOOK FOR THE ANSWERS— Richard A. Hochman, Esq., APM, McKay Hockman Company, Inc.
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(5) QDROs—EVALUATING THEM FOR DIFFERENT PLAN TYPES— Linda R. Morra, Brucker Morra & Hiltunen, APC
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(6) THE EFFECTS OF MERGERS AND ACQUISITIONS ON DB PLANS— Raymond D. Berry, ASA, MAAA, EA, KPMG, LLP, and Richard A. Nelson, APM, Faegre & Benson, LLP
- 01ASPA-460
(7) PROVIDING ACTUARIAL TESTIMONY— Michael B. Preston, MSPA, Preston Actuarial Services
- 01ASPA-470
(8) DESIGN TECHNIQUES FOR 401(k) PLANS TO ENCOURAGE ENROLLMENT AND EASE ADMINISTRATION— William G. Karbon, MSPA, CPC, QPA, CBIZ Retirement Services, Inc., and Rebecca C. Kester, CPC, Fleet Bank
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(10) WHAT IS “EARNED INCOME?” MAYBE IT IS, MAYBE IT ISN’T!— Gary S. Lesser, JD, GSL Galactic Consulting
- 01ASPA-490
(11) CASE LAW REVIEW— Alex M. Brucker, Esq., APM, Brucker Morra & Hiltunen, APC
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(13) PRODUCING AN UNDERSTANDABLE ACTUARIAL REPORT— Michael I. Pisula, MSPA, dpb&z, inc.
- 01ASPA-520
(14) ACTUARIAL STANDARDS AFFECTING THE SMALL PLAN ACTUARY— Lawrence Deutsch, MSPA, Larry Deutsch Enterprises, and Alan J. Stonewall, FSPA, Deloitte & Touche, LLP
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(15) THE OTHER “CROSS-TESTED” PLANS— Norman Levinrad, FSPA, CPC, Summit Benefit & Actuarial Services, Inc.
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(16) SECRETS TO SUCCESSFUL 401(k) ENROLLMENT— Vincent Giordano, Minnesota Life Insurance Company, and Cynthia A. Groszkiewicz, MSPA, QPA, Altman, Greenberg Traurig
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(18) TPA AGREEMENTS & TPA LIABILITY— Jane E. Armstrong, Phelps Dunbar Marks Claverie
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(19) RESOLVING FORM 5500 ISSUES— Valeri L. Stevens, APM, Main Street Benefits, Inc.
- 01ASPA-570
(20) THE NEW VOLUNTARY CORRECTION PROGRAM UNDER EPCRS— Bruce L. Ashton, Esq., APM, Reish Luftman McDaniel & Reicher
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(21) CASH BALANCE PLANS—EXACTLY HOW DO THEY WORK FOR SMALL PLANS— Aaron Venouziou, MSPA, DATAIR Employee Benefit Systems
- 01ASPA-590
(22) 401(k) TAKEOVERS AND CONVERSIONS— Cheryl L. Morgan, CPC, Morgan Consulting Services
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(23) CHANGING YOUR ACTUARIAL FUNDING METHOD— James E. Holland, Jr., Actuarial Group 1, Internal Revenue Service, and Tonya Bowman Manning, FSA, FCA, MAAA, EA, Aon Consulting
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(24) COMPLETING A SCHEDULE B AND FUNDING ISSUES— Raymond D. Berry, ASA, MAAA, EA, KPMG LLP, and Martin Pippins, EP Actuarial Group, Internal Revenue Service
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(25) ACTUARIAL PROFESSIONALISM: QUALIFICATIONS, STANDARDS, AND ENFORCEMENT— Ruth F. Frew, FSPA, CPC, MAAA, EA; Carl Shalit, MSPA, Carl Shalit & Associates; Alan J. Stonewall, FSPA, Deloitte & Touche, LLP
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(26) HOW TO ASSURE 404(c) IS MET— Stuart Hack, APM, The Stuart Hack Company
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(27) BUSINESS CHECKS AND BALANCES— Karen F. Dixon, CPC, QPA, Qualified Plan Administrators, Inc.
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(28) DB PLANS FOR DC ADMINISTRATORS— Lorraine Dorsa, MSPA, MAAA, EA, Lorraine Dorsa & Associates
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(31) EGTRRA AND THE IRA—NEW PORTABILITY— Alex M. Brucker, Esq., APM, Brucker Morra & Hiltunen, APC
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(32) NONQUALIFIED DEFERRED COMPENSATION PLANS— Joseph Henthaler, Towers Perrin
- 01ASPA-700
(33) THE EFFECTS OF MERGERS AND ACQUISITIONS ON 401(k) PLANS— Ilene H. Ferenczy, CPC, Powell, Goldstein, Frazer & Murphy, LLP
- 01ASPA-710
(34) PRACTICAL ISSUES WITH 401(k) TESTING— Rajean Bosier, CPC, QPA, Cache Pension
- 01ASPA-720
(35) DESIGNING CROSS-TESTED PLANS UNDER THE NEW REGULATIONS— Joan A. Gucciardi, MSPA, CPC, Gucciardi Benefit Resources, Inc.
- 01ASPA-720R (Repeated Session)
(71) DESIGNING CROSS-TESTED PLANS UNDER THE NEW REGULATIONS— Joan A. Gucciardi, MSPA, CPC, Gucciardi Benefit Resources, Inc.
- 01ASPA-730
(36) RUNNING A SUCCESSFUL TPA FIRM— Renee J. Conner, QPA, Keystone Retirement Corporation; Cathy M. Green, CPC, QPA, CMC; Gwen S. O’Connell, CPC, QPA, Summit Benefit & Actuarial Services, Inc.
- 01ASPA-740
(37) RECOGNIZING A PROHIBITED TRANSACTION— Bruce L. Ashton, Esq., APM, Reish Luftman McDaniel & Reicher, and Martin M. Heming, Esq., APM, Reish Luftman McDaniel & Reicher
- 01ASPA-750

- (39) ESTATE PLANNING WHEN YOUR RETIREMENT PLAN IS ONE OF YOUR LARGEST ASSETS— John J. Weiler, LLM, Weiler & Rees
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- (40) THE FUTURE OF DETERMINATION LETTERS— Paul T. Shultz, Employee Plans Rulings and Agreements, Internal Revenue Service
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- (41) INVESTMENT BASICS FOR PENSION ACTUARIES— Stephen H. Rosen, MSPA, CPC, Stephen H. Rosen & Associates
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- (42) CASH BALANCE PLANS—THE TECHNICAL LINGO— Howard M. Phillips, MSPA, Howard M. Phillips, E.A.
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- (43) DB PLANS FOR DB ADMINISTRATORS— Charles J. Klose, FSPA, CPC, The Vanguard Group
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- (44) COMPLIANCE-ONLY CONSULTING IN THE DAILY VALUATION WORLD— Janice M. Wegesin, CPC, QPA, JMW Consulting, Inc.
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- (45) CONVINCING THE PLAN SPONSOR THAT HE HAS RESPONSIBILITIES AND THEY'RE NOT ALL YOURS!— Amy L. Cavanaugh, QPA, OKA, CPC, Newkirk Products, Inc.
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- (46) WHEN DOES A PLAN CROSS THE LINE AND RISK DISQUALIFICATION AND WHAT ARE THE CONSEQUENCES OF DISQUALIFICATION?— William N. Anspach, Jr., Esq., CPC, Much Shelist Freed Denenberg Ament & Rubenstein, P.C.
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- (47) NEW CAFETERIA RULES: WHAT ARE THEY AND HOW DO EMPLOYERS DEAL WITH THEM— Lawrence Grudzien, JD, LLM, Buck Consultants
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- (48) TERMINATING DB PLANS— Kurt Piper, MSPA, Piper Pension & Profit Sharing
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- (49) REVITALIZING DB PLANS— Edward E. Burrows, MSPA
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- (50) ADVANCED DESIGN ISSUES FOR DB PLANS— Lawrence Deutsch, MSPA, Larry Deutsch Enterprises
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- (51) LESSONS FROM THE BEAR MARKET: FIDUCIARY RESPONSIBILITIES FOR 401(k) INVESTMENTS— Fred Reish, APM, Reish Luftman McDaniel & Reicher
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- (52) 401(k) SAFE HARBOR—CREATIVE DESIGN IDEAS— Richard A. Nelson, APM, Faegre & Benson LLP
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- (53) NON-DISCRIMINATION TESTING—HOW DOES IT REALLY WORK?— Thomas E. Poje, QPA, Lorraine Dorsa & Associates
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- (54) DESIGNING PLANS AFTER EGTRRA— Kevin J. Donovan, MSPA, CPA, EA, Tucson Pension Consultants, and Joan A. Gucciardi, MSPA, CPC, Gucciardi Benefit Resources, Inc.
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- (55) JUNK IN PLANS (APART FROM CHINESE VESSELS AND HIGH-YIELD BONDS)— Nicholas L. Saakvitne, Saakvitne Law Corporation
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- (56) SECRETS OF SUCCESSFULLY NEGOTIATING AN IRS AUDIT— Martin M. Heming, Esq., APM, Reish Luftman McDaniel & Reicher, and Nicholas J. White, APM, Reish Luftman McDaniel & Reicher
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- (57) PLAN EXPENSES—IF YOU WANT THE PLAN TO PAY, SHOULD IT? CAN IT?— R. Bradford Huss, Esq., APM, Trucker Huss
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- (58) PARTICIPANT LOANS: CHANGES REQUIRED BY NEW GUIDANCE— Robert M. Richter, APM, SunGard Corbel
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- (59) PBGC NEWS AND UPDATES
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- (60) WALKING STEP BY STEP THROUGH THE DB GENERAL TEST— Carol R. Sears, FSPA, CPC, Actuarial Consulting Group, Inc.
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- (61) 401(k)—ASK THE EXPERTS— Jane E. Armstrong, Phelps, Dunbar, Marks, Claverie; Scott E. Hiltunen, Esq., CPC, Brucker Morra & Hiltunen, APC; Craig P. Hoffman, APM, SunGard Corbel
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- (62) HOW TO ADMINISTER AN ESOP PLAN— Kevin Long, Chang, Ruthenberg & Long Law
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- (63) USING THE INTERNET TO DISCOVER VALUABLE 401(k) MARKET DATA AND TRENDS— David R. Baker, BenefitsLink
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- (64) ISSUES WHEN DEALING WITH A GLOBAL BUSINESS— Barry S. Kublin, Benefit Plans Administrators, and Alfredo Matheu, USB Paine Webber Trust
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- (65) BENEFITS, RIGHTS AND FEATURES— Kristin Bergstrom, Reinhart, Boerner, et al.
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- (66) PARTIAL PLAN TERMINATIONS: IDENTIFYING AND DEALING WITH THEM— Susan J. Daley, Esq., Altheimer & Gray
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- (67) THE BEGINNER'S GUIDE TO DETERMINING CONTROLLED GROUP OR AFFILIATED SERVICE GROUP STATUS— Ronald Gross, MSPA, Moskal Klein, Inc.
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- (68) NEW MINIMUM DISTRIBUTION RULES AND OTHER ISSUES— Elizabeth T. Hallam, CPC, CLU, Equitable Life
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- (69) USING COVERAGE AS A PLAN DESIGN FEATURE FOR DB/DC COMBOS— Kenneth A. Balinski, MSPA, Chicago Consulting Actuaries
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- (70) EVALUATING 401(k) INVESTMENT PRODUCTS FOR YOUR CLIENTS— Eric Schneeman, Search 401k.com

GENERAL SESSIONS

- 01ASPA-1071
- 01ASPA-1072
(This session presented on 2 cassettes—\$20.00)
PENSION REFORM PASSES!— Brian H. Graff, Esq., CPA, ASPA; Craig P. Hoffman, APM, SunGard Corbel; George J. Taylor, MSPA, ARIS Pension Services
- 01ASPA-1081
- 01ASPA-1082
(This session presented on 2 cassettes—\$20.00)
IRS Q&A— Carol D. Gold, Esq., Employee Plans Division, TE/GE, Internal Revenue Service; Kevin J. Donovan, APM, Pinnacle Plan Design, PC; Craig P. Hoffman, APM, SunGard Corbel; James E. Holland, Jr., Actuarial Group 1, Internal Revenue Service; Paul T. Shultz, Employee Plans Rulings and Agreements, Internal Revenue Service; Lawrence C. Starr, CPC, EA, CEBS, Qualified Plan Consultants, Inc.; Richard J. Wickersham, Esq., Guidance and Quality Assurance, TE/GE, Internal Revenue Service; Ann L. Combs, Esq., PWBA, U.S. Department of Labor; William Sweetnam, Esq., Office of Benefits Tax Counsel, Department of Treasury
- 01ASPA-1090
GUST AND EGTRRA— Michael J. Finch, CPC, Universal Pensions, Inc., and Richard A. Hochman, Esq., APM, McKay Hochman Company, Inc.
- 01ASPA-1090R (Repeated Session)
GUST AND EGTRRA— Michael J. Finch, CPC, Universal Pensions, Inc., and Richard A. Hochman, Esq., APM, McKay Hochman Company, Inc.
- 01ASPA-1101
- 01ASPA-1102
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KEEPING CURRENT— Sal L. Tripodi, APM, TRI Pension Services

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