

SUMMER AUDIO CD PROGRAM

CRAM SESSIONS

- 04ASPA-401
- 04ASPA-402
- 04ASPA-403
- 04ASPA-404

(This session presented on 4 Audio CDs—\$60.00)

DC-1 CRAM SESSION— Gwen S. O'Connell, CPC, QPA, Gwen O'Connell Pension Consulting, Inc.

- 04ASPA-411
- 04ASPA-412
- 04ASPA-413
- 04ASPA-414

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DC-2 CRAM SESSION— Charles J. Klose, FSPA, CPC, The Vanguard Group

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- 04ASPA-423

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DC-3 CRAM SESSION— Amy L. Cavanaugh, CPC, QPA, QKA, Accudraft

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- 04ASPA-434

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DB CRAM SESSION— David B. Farber, MSPA

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- 04ASPA-444

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C-3 CRAM SESSION— William G. Karbon, MSPA, CPC, QPA, CBIZ Benefits & Insurance Services, Inc.

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- 04ASPA-454

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C-4 CRAM SESSION— Thomas J. Finnegan, MSPA, CPC, QPA, The Savitz Organization, Inc.

PANEL DISCUSSIONS

- 04ASPA-460

PANEL DISCUSSION: DB— Richard A. Block, MSPA, Block Consulting Actuaries, Inc., and Norman Levinrad, FSPA, CPC, Summit Benefit & Actuarial Services, Inc.

- 04ASPA-470

PANEL DISCUSSION: DC/401(k)— Rajean M. Bosier, CPC, QPA, QKA, CEBS, CRC, CRA, Consultant & Trainer, and Linda R. Morra, Brucker & Morra, APC

- 04ASPA-480

PANEL DISCUSSION: IRS/DOL FORM 5500 AND DOL SMALL PLAN AUDIT WAIVER— Scott C. Albert, QPA, US Department of Labor, and Valeri L. Stevens, APM, Main Street Benefits, Inc.

WORKSHOPS

- 04ASPA-490

POINT-COUNTERPOINT: INDIVIDUAL DIRECTION vs. MANAGED ACCOUNTS— Mark A. Davis, Mark A. Davis Consulting, Inc., and Steve Schoen, Allied Consulting Group

- 04ASPA-490R

(Repeated Session)

POINT-COUNTERPOINT: INDIVIDUAL DIRECTION vs. MANAGED ACCOUNTS— Mark A. Davis, Mark A. Davis Consulting, Inc., and Steve Schoen, Allied Consulting Group

- 04ASPA-500

401(k) 101—THIS IS WHERE YOU START— Robert M. Kaplan, CFP, CPC, QPA, APA, McKay Hochman Company, Inc., and Janice M. Wegesin, CPC, QPA, JMW Consulting, Inc.

- 04ASPA-510

THE FIVE Ws OF DOL INVESTIGATIONS— Jean Ackerman, US Department of Labor, and Debra A. Davis, Esq., Reish Luftman Reicher & Cohen

- 04ASPA-520

WHAT YOU NEED TO KNOW ABOUT COMPLETING THE SCHEDULE B— Kurt F. Piper, MSPA, Piper Pension & Profit Sharing

- 04ASPA-530

COVERAGE TESTING WITH MULTIPLE COMPANIES— Joan A. Gucciardi, MSPA, CPC, Summit Benefit & Actuarial Services, Inc.

- 04ASPA-540

TURNING ADMINISTRATIVE HEADACHES INTO CONSULTING OPPORTUNITIES— Cheryl L. Morgan, CPC, QKA, Morgan Consulting Services

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EGTRRA REMEDIAL AMENDMENT PERIOD— Richard A. Hochman, APM, McKay Hochman Company, Inc.
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DEFICIT REDUCTION CONTRIBUTIONS— Richard A. Groszkiewicz, MSPA, Software Polish
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OVERVIEW OF PARTICIPANT DISTRIBUTIONS— Adam C. Pozek, RHU, REBC, Swerdlia & Company
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ADVANCED 401(k) ISSUES— Janice M. Wegesin, CPC, QPA, JMW Consulting, Inc., and Robert M. Kaplan, CFP, CPC, QPA, APA, McKay Hochman Company, Inc.
- 04ASPA-580R
(Repeated Session)
ADVANCED 401(k) ISSUES— Janice M. Wegesin, CPC, QPA, JMW Consulting, Inc., and Robert M. Kaplan, CFP, CPC, QPA, APA, McKay Hochman Company, Inc.
- 04ASPA-590
TOP TEN FIDUCIARY PROBLEMS— Fred Reish, Esq., APM, Reish Luftman Reicher & Cohen
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USING SIMPLEs & SEPs TO MAKE YOUR 401(k) SALE— Beverly B. Haslauer, CPC, QPA, The Haslauer Group, Inc.
- 04ASPA-610
ACTUARIAL VALUE OF ASSETS—ASSET SMOOTHING TECHNIQUES— Marilyn P. Janzen, Principal Financial Group, and Michael B. Preston, MSPA, Preston Actuarial Services, Inc.
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SOPHISTICATED PLAN DESIGNS— Michael E. Callahan, FSPA, CPC, PenTec, Inc., and Nicolas E. DeFiori, MSPA, MAAA, Louis Kravitz & Associates, Inc.
- 04ASPA-630
LIABILITY OF OFFERING INVESTMENT ADVICE— Stuart Hack, JD, CLU, APM, Sunlin Consulting, LLP
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BUSINESS EXPANSION/ACQUISITION— Paul S. Polapink, MSPA, Price, Raffel & Browne Administrators, Inc.
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UPDATE ON WORKING WITH PBGC COVERED PLANS— Richard A. Block, MSPA, Block Consulting Actuaries, Inc.
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ANALYZING THE CENSUS TO DETERMINE THE OPTIMAL PLAN DESIGN— Margery F. Paul, MSPA, Mellon Human Resources and Investor Solutions
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CASH BALANCE PLANS—ADVANCED ISSUES— Norman Levinrad, FSPA, CPC, Summit Benefit & Actuarial Services, Inc.
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INVESTING IN ILLIQUID ASSETS BY RETIREMENT TRUSTS— Alex M. Brucker, Esq., APM, Brucker & Morra, APC
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FUN WITH FUNDING METHODS— Lawrence Deutsch, MSPA, Larry Deutsch Enterprises, and James E. Holland, Jr., ASA, IRS
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DISTRIBUTION PLANNING FOR THE AFFLUENT PARTICIPANT— Steven L. Guise, Esq., Munger, Tolles & Olson, LLP, and John Horning, Louis Kravitz & Associates, Inc.
- 04ASPA-720
ELIMINATE QDRO CONTROVERSY—YOUR CLIENTS WILL LOVE YOU FOR IT!— Linda R. Morra, Brucker & Morra, APC
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IMPROVING PLAN DESIGNS WITH DB/DC COMOS— Lawrence Deutsch, MSPA, Larry Deutsch Enterprises
- 04ASPA-740
ABUSIVE RETIREMENT PROGRAMS— Martin A. Heming, Esq., APM, Reish Luftman Reicher & Cohen
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STEP-BY-STEP CROSS TESTING FOR DEFINED CONTRIBUTION PLANS— Jane L. Osa, MSPA, Jane L. OSA & Associates, Inc.
- 04ASPA-760
PREPARE AND CONDUCT A SUCCESSFUL IRS AUDIT— Rajean M. Bosier, CPC, QPA, QKA, CEBS, CRC, CRA, Consultant and Trainer

GENERAL SESSIONS

- 04ASPA-771
- 04ASPA-772
(This session presented on 2 Audio CDs—\$30.00)
WASHINGTON UPDATE— Brian H. Graff, Esq., ASPA; John J. O'Neill, Esq., US Senate Finance Committee; W. Thomas Reeder, Esq., Department of Treasury
- 04ASPA-780
MUTUAL FUND SCANDALS—HOW THEY WILL AFFECT YOU AND YOUR CLIENTS— Mark A. Davis, Mark A. Davis Consulting, Inc.; Brian H. Graff, Esq., ASPA; Fred Reish, Esq., APM, Reish Luftman Reicher & Cohen

