

# *MCLE for Attorneys*

## 57<sup>th</sup> Annual Employee Benefits Conference

October 30-November 2, 2011  
New Orleans, Louisiana

Each state must review and approve the Annual Conference for continuing legal education (CLE) credit. The maximum amount of CLE instruction over the 2½-day conference (11 sessions) is 825 minutes.

**Submit one completed continuing education form per session attended.**

The following sessions are **recommendations** for CLE:

### **Monday, October 31, 2011**

#### **9:15-10:30 a.m.**

- 109 Lawsuits—ERISA Litigation—  
Limitation Periods and Class Actions
- 213 The Perfect Storm for Health Care Fraud—  
How Vulnerable Are You?
- 401 Featured Session—DOL Update
- 521 Making Every Basis Point Count (Getting the Best Value From  
Your Defined Contribution Service Provider)

#### **10:45 a.m.-12:00 noon**

- 103 Are There Greater Fiduciary Responsibilities in Your Defined  
Contribution (DC) Plans?
- 204 Health Care Reform—Where Are We Today,  
and What's Coming?
- 304 Withdrawal Liability
- 307 Workshop—Unwinding a Plan
- 517 Primer on Target-Date Funds
- 803 Preparing Your Apprenticeship Fund for a DOL Audit
- ATTY-1 Ethical Issues for Attorneys (Ethics CLE credit)

#### **1:30-2:45 p.m.**

- 102 Refresher on Trustee Expenses
- 105 New Obligations for Plan Fiduciaries and Service Providers
- 106 What You Need to Know About Reporting and Disclosure
- 313 So You Want to Add a Defined Contribution (DC) Plan
- 314 WORKSHOP—New FASB Rules and Their Impact
- 402 Trustees Under Oath
- 505 International Bonds
- 707 Managing a DOL or IRS Audit
- 804 WORKSHOP—Compliance Followup
- 902 Costs of Changing From a Defined Benefit to a  
Defined Contribution Plan
- ATTY-5 All About Contracting

#### **3:00-4:15 p.m.**

- 101 Key Legal Decisions: Their Impact on You and Your Plans
- 104 WORKSHOP—Handling Conflicting Loyalties—  
When Neither Hat Fits
- 211 Collective Bargaining and Health Care Reform
- 306 Turning a Plan Over to PBGC
- 308 A Pension Legislative and Regulatory Update
- 312 Collective Bargaining and the Pension Protection Act
- 404 Effective Use of Arbitration
- 407 Collection Challenges
- 706 DOL Compliance Workshop
- 907 Update on GASB Pension Accounting
- ATTY-4 Scams, Shams and Fraud: ERISA Remedies

*Continued on next page*



## Tuesday, November 1, 2011

### 7:30-8:45 a.m.

- 101 Key Legal Decisions: Their Impact on You and Your Plans
- 103 Are There Greater Fiduciary Responsibilities in Your Defined Contribution (DC) Plans?
- 204 Health Care Reform—Where Are We Today, and What's Coming?
- 301 Featured Session—The Future of Retirement in America (Part I)
- 313 So You Want to Add a Defined Contribution (DC) Plan
- 402 Trustees Under Oath
- 408 Maximizing Your Payroll Audits
- 601 New Challenges in Communications
- 801 Legal and Fiduciary Issues in Training and Education Funds
- 906 Impact of Pay-to-Play Rules
- ACCT-2 Dealing With New Disclosures for Multiemployer Plans
- ATTY-2 Dealing With New Disclosures for Multiemployer Plans

### 9:00-10:15 a.m.

- 107 What Trustees Should Know About the Exceptions to Attorney-Client Privilege
- 110 WORKSHOP—Professional Boundaries for Fund Counsel/Advisors and Trustees
- 213 The Perfect Storm for Health Care Fraud—How Vulnerable Are You?
- 216 Mental Health Parity—Where Are We Now?
- 302 The Future for a Secure Retirement (Part II)
- 306 Turning a Plan Over to PBGC
- 307 WORKSHOP—Unwinding a Plan
- 407 Collection Challenges
- 505 International Bonds
- 519 What Should Your Investment Consultant Be Doing?
- 705 WORKSHOP—The New Electronic Data Standards
- 908 Implementing Value-Based Health Care for Public Employer Plans
- ACCT-1 DOL Update
- ATTY-3 Value-Based Health Care Design

## Wednesday, November 1, 2011

### 7:30-8:45 a.m.

- 102 Refresher on Trustee Expenses
- 111 What You Need to Know—Fiduciary Liability Insurance and Indemnification
- 216 Mental Health Parity—Where Are We Now?
- 303 The Future of Defined Benefit Plans (Part III)
- 305 Workshop—Withdrawal Liability Advanced Issues
- 308 A Pension Legislative and Regulatory Update
- 404 Effective Use of Arbitration

### 10:30-11:45 a.m.

- 104 WORKSHOP—Handling Conflicting Loyalties—When Neither Hat Fits
- 105 New Obligations for Plan Fiduciaries and Service Providers
- 211 Collective Bargaining and Health Care Reform
- 218 Effective Approaches in Managing Depression and Chronic Illness
- 303 The Future of Defined Benefit Plans (Part III)
- 304 Withdrawal Liability
- 703 The Varied Roles of the Administrator
- 904 State Legislative Update
- ATTY-6 Hot Topics

### 1:15-2:30 p.m.

- 107 What Trustees Should Know About the Exceptions to Attorney-Client Privilege
- 108 Ongoing Trustee Responsibility Regarding Investment Management Agreements
- 109 Lawsuits—ERISA Litigation—Limitation Periods and Class Actions
- 305 Workshop—Withdrawal Liability Advanced Issues
- 312 Collective Bargaining and the Pension Protection Act
- 314 WORKSHOP—New FASB Rules and Their Impact
- 408 Maximizing Your Payroll Audits
- 519 What Should Your Investment Consultant Be Doing?
- 601 New Challenges in Communications
- 704 Managing Privacy and Participant Expectations
- ACCT-4 Refresher on Auditing Plan Expenses and Participant Data

### 2:45-4:00 p.m.

- 106 What You Need to Know About Reporting and Disclosure
- 210 Claims Review and Appeals: A Proactive Approach for Benefit Plans
- 218 Effective Approaches in Managing Depression and Chronic Illness
- 311 Benefit Suspension and Retirement Issues
- 517 Primer on Target-Date Funds
- 521 Making Every Basis Point Count (Getting the Best Value From Your Defined Contribution Service Provider)
- 524 Avoiding “Madoff-Like” Investments

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