22nd Annual

Cincinnati Employee Benefits Conference

Thursday, June 11 & Friday, June 12, 2009

11.75 Hours of CLE Credit, including 1.0 Hour Ethics
CPE, CFP and other CE Credit also available

Location:
Sharonville Convention Center
11355 Chester Road
Sharonville, OH 45246

Sponsoring Organizations:
Internal Revenue Service
U.S. Department of Labor
Cincinnati Bar Association
Employee Benefits Committee

Cooperating Organizations:
Dayton Bar Association
Employee Benefits Committee
Louisville Employee Benefits Council
Thursday, June 11, 2009

8:45 a.m.  National IRS Headquarters Presentation: Rulings and Agreements and Exam Update
James E. Holland, Jr., Assistant Director, EP Rulings & Agreements, Washington, D.C.
Monika A. Templeman, Director, EP Examinations, Baltimore, Maryland

10:30 a.m.  Break

10:45 a.m.  IRS Local Office Presentation
Jennifer L. Frederick, EP Determinations Group Manager, Cincinnati, Ohio
Melissa S. Whelan, Senior EP Reviewer, Cincinnati, Ohio
Catherine Waite, Pre-Approved Plans Manager, Cincinnati, Ohio

12 p.m.  Lunch (provided)

1:20 p.m.  Cafeteria Plan Regulations
Larry Grudzien, Esq., Oak Park, Illinois

2:20 p.m.  Break

2:30 p.m.  Breakout Sessions
Session One: 403(b) Accounting Issues
Scott Albert, Chief, Division of Reporting Compliance, U.S. Department of Labor, Employee Benefits Security Administration, Office of the Chief Accountant, Washington, D.C.

Session Two: HSAs
Mikal A. Jeffries, HORAN, Cincinnati, Ohio

3:30 p.m.  Break

3:40 p.m.  Breakout Sessions
Session One: Ethics
Patrick Fischer, Esq., Keating Muething & Klekamp PLLC, Cincinnati, Ohio

Session Two: COBRA Continuation Subsidy

4:40 p.m.  Adjourn

Friday, June 12, 2009

8:30 a.m.  ERISA Update
Sal Tripodi, TRI Pension Services, Highlands Ranch, Colorado
(includes 15 minute break)

11:45 a.m.  Lunch (provided)
Luncheon Presentation: Retirement Update
Rob Portman, Former U.S. Congressman & Candidate for U.S. Senate

1 p.m.  HIPAA Update
William M. Freedman, Esq., Dinsmore & Shohl LLP, Cincinnati, Ohio

1:50 p.m.  Break

2 p.m.  Breakout Sessions
Session One: 401k Plan Update
Richard A. Hochman, McKay Hochman Company, Inc., Butler, New Jersey

Session Two: Hot Topics in Defined Benefit Plans
James E. Holland, IRS
Martin L. Pippins, IRS

3 p.m.  Break

3:10 p.m.  Breakout Sessions
Session One: 403(b) Update
Robert J. Architect, IRS, Senior Tax Law Specialist, Washington, D.C.

Session Two: Stock Drop Case Law Review
Frank Bitzer, Esq., Greenebaum Doll & McDonald PLLC, Cincinnati, Ohio
Ben Wells, Esq., Dinsmore & Shohl LLP, Cincinnati, Ohio

4:10 p.m.  Adjourn
The Cincinnati Bar Association is an established sponsor in the State of Ohio and is, therefore, granted presumptive approval of its activities. This program qualifies for up to 11.75 hours of Ohio CLE credit, including 1.0 hour of Ethics. It also qualifies for 11.75 hours of credit with in Kentucky and Indiana. It qualifies for 11.5 hours of credit in Pennsylvania.

CPE, CFP & Other CE Credit
CPE and CFP credit are available for this program. And, at the request of the attendee, assistance will be provided in reporting to other jurisdictions and agencies.

Location Information / Parking / Directions
Sharonville Convention Center
11355 Chester Road, Sharonville, OH 45246
(513) 771-7744
The Sharonville Convention Center is conveniently located just 15 miles North of downtown Cincinnati at the intersection of I-75 and I-275. Plentiful FREE parking is available onsite. For directions, please visit www.sharonvilleconventioncenter.com. Complimentary wireless Internet access will be available to all attendees.

Hotel Reservations
For hotel reservations, please call the Sheraton Cincinnati North, 11320 Chester Road, (888) 627-7176. The hotel is holding rooms at the conference rate of $105 per night plus tax. Please mention “Cincinnati Employee Benefits Conference” when booking. Reservations made after May 20 will be subject to availability.

Conference Planning Committee
Chair, Frank J. Bitzer, Esq., Greenebaum Doll & McDonald PLLC
Paul Baumann, Regional Director, Employee Benefits Security Administration, U.S. Department of Labor
Robert P. Bell, IRS
Lyndsey R. Cater, Esq., Graydon Head & Ritchey LLP
Rodney E. Driscoll, Esq., Frost Brown Todd LLC
Sharon Polo, IRS
Bernadine C. Topazio, Esq., Convergys Corporation
David A. Whaley, Esq., Dinsmore & Shohl LLP

Cancellations received at least two business days prior to the seminar will be refunded less a $50 processing fee. Individuals who cancel after this time will receive course materials in lieu of a refund. Substitutions are welcome at any time.

If you have any special needs addressed by the Americans with Disabilities Act, please let us know at least one week prior to the seminar.

Registration
3 easy ways to register
Mail to: Cincinnati Bar Association / CLE Dept.
225 E. 6th St., 2nd Fl., Cincinnati, OH 45202
Checks payable to Cincinnati Bar Association
Fax: (513) 381-0528 (with credit card info)
Phonet (513) 699-4028 (with credit card info)

Registration
22nd Annual Cincinnati Employee Benefits Conference
June 11 & 12, 2009
$370 registered by May 15, 2009
$420 registered after May 15, 2009
Please check the sessions you plan to attend:

Thursday, June 11
2:30 p.m.  q 403(b) Accounting Issues  q HSAs
3:40 p.m.  q Ethics  q COBRA

Friday, June 12
2 p.m.  q 401k Plan Update  q Defined Benefit Plans
3:10 p.m.  q 403(b) Update  q Stock Drop Case Review

Name(s) ____________________________________________
Firm ________________________________________________
Address ____________________________________________
City ___________________ State _______ Zip___________
Phone ____________________________
E-mail _____________________________________________
Enclosed is my check in the amount of $____________________ made payable to the Cincinnati Bar Association. Please charge my credit card the amount of $____________________
q Visa  q MasterCard  q Discover  q Am. Express
Card Number _______________________________________
Expiration Date _____________________________________
Cardholder Signature ________________________________

Special Needs:
Disability/Accommodations ____________________________
Special Diet _________________________________________

Return the registration form, with payment, to the
Cincinnati Bar Association
225 East Sixth Street, 2nd Floor
Cincinnati, OH 45202-3209
ATTN: CLE Department
Fax: (513) 381-0528

For more information contact:
CLE Department, Cincinnati Bar Association
Phone: (513) 699-4028