



San Francisco Chapter **SPRING CONFERENCE**

Thursday, May 22, 2014
8:00 a.m. - 12:30 p.m.
The Palace Hotel

SPONSORED BY:



CONFERENCE SCHEDULE

| | | | |
|----------------------|--|---|--|
| 8:00 – 8:30 | Registration and Hosted Continental Breakfast | | |
| 8:30 – 8:45 | Welcome & Opening Remarks | | |
| 8:45 – 10:00 | Keynote: O.C. Tanner , a <i>PLANSPONSOR</i> 2014 Plan Sponsor of the Year Award Winner, shares the company's philosophy of commitment, caring and employee recognition. They will describe how these best practices result in long-term loyalty and productivity excellence and how that translates to an effective retirement readiness program. | | |
| 10:00– 10:15 | BREAK | | |
| | Track A | Track B | Track C |
| 10:15 – 11:15 | Legal Benefits Update: Trucker ♦ Huss, APC | Pension Risk: Managing Opportunities for Plan Sponsors: Mercer | Financial Wellness: Facebook and Intuit |
| 11:15 – 11:30 | BREAK | | |
| 11:30 – 12:30 | Revenue Equalization: SageView Advisory Group | Regulatory Update: Jean Ackerman of the DOL (invited) | Establishing a Successful Wellness Program: Jamba Juice , CA Dental Association and The Melita Group |

2014 SPRING CONFERENCE PROGRAM DETAILS

Keynote Address

Employee Recognition: Can your Employees Retiree with Dignity? An Inside Look at an Employer Committed to this Cause

O.C. Tanner, founded in 1927 and headquartered in Salt Lake City, UT, develops employee recognition and rewards programs that help companies appreciate people who do great work. They lead the recognition industry in researching and sharing insights around the universal human need to create value and be appreciated. O.C. Tanner not only helps companies acknowledge employee contributions, they practice what they preach in a big way. Recently honored by *PLANSPONSOR* as a 2014 Plan Sponsor of the Year, O.C. Tanner's Jeff and Kevin will share their company's unique philosophy of commitment and caring and describe how these best practices result in long-term loyalty and productivity excellence across their 1,350+ workforce. O.C. Tanner takes retirement readiness to heart, helping their associates prepare for their future with comprehensive, ongoing financial education and targeted outreach, auto enrollment and auto escalation, an annual non-elective contribution, plus a generous match. O.C. Tanner exemplifies what it means to lead by example and follow through on its promise to ensure a secure retirement for its employees as a well-deserved thank you for dedicated service.

Speakers:

Jeff Bedke, Treasurer, O.C. Tanner

Kevin Ames, Director of Training, O.C. Tanner

Moderator:

Justin Chilcote, Transamerica Retirement Solutions

10:15 A.M. – 11:15 A.M. BREAKOUT SESSIONS:

LEGAL BENEFITS UPDATE

As if keeping up with day-to-day plan compliance isn't daunting enough, busy benefit professionals must also understand recent litigation and claims of fiduciary breach and how that shapes ongoing employee plan governance. Helping us navigate the complex legal landscape is one of our nation's top ERISA experts, Brad Huss, who will provide an update on recent lessons learned from court cases. Get the latest current hot topics in the benefits litigation world, such as the ongoing impact of *Tussey v. ABB*, the Supreme Court's recent decision in *Heimeshoff* and its upcoming consideration of *Dudenhoeffer* and employer stock investments, and other emerging issues including new potential sources of ERISA liability.

Speakers:

Brad Huss, Trucker ♦ Huss
Plan sponsor rep to be named

Moderator:

Karen Casillas, CAPTRUST Financial Advisors

PENSION RISK MANAGEMENT

Pension volatility remains top-of-mind for plan sponsors. With continuing economic uncertainty, market volatility, fluctuating interest rates, plus increasing longevity, managing DB pension risk is a critical business issue. In this session, Xavier Erhart will review the current landscape and opportunities available to plan sponsors.

Speaker:

Xavier Erhart, Mercer

Moderators:

Matthew J. Borro, Law Offices of Matthew J. Borro
Jennifer Brooks, Trucker ♦ Huss

FINANCIAL WELLNESS

How financially secure are your employees in the recovering economy? Equity and housing markets have significantly recovered since the lows of several years ago, but has the financial health of your employees improved? Are they taking advantage of all tax and savings opportunities available to them through company programs and beyond? Many companies, including those in the hi-tech sector, are taking a fresh look at how they can support their employees to improve their financial fitness.

This session will be a panel discussion with Renee Whitney, Benefits Manager at Facebook and Josh Newmister, Global Retirement Leader at Intuit. Renee and Josh will share their unique perspectives of how both companies have established financial wellness objectives and frameworks tying back to overall company values. The discussion will include retirement and savings programs as part of wealth accumulation and expand to cover a broader discussion of employee financial lifecycle topics such as debt reduction, budgeting and financial planning. Bring your questions for Renee and Josh!

Speaker:

Renee Whitney, Facebook, Inc.
Josh Newmister, Intuit, Inc.

Moderator:

Laura Dalzell, Towers Watson

11:30 A.M. – 12:30 P.M. BREAKOUT SESSIONS

REVENUE EQUALIZATION AND DISCUSSIONS WITH RETIREMENT PLAN COMMITTEES

Committees are grappling with revenue equalization concepts, including: fairness to all employees in a participant directed account, how to achieve true equalization or only perceived equalization (hard dollar versus % of assets) and what it means to companies as both fiduciaries and a business. We will review these concepts and discuss the trends we are finding with our clients and in the industry.

Speaker:

Bob Patton, SageView Advisory

Moderator:

Mike Zelda, Moss Adams LLP

REGULATORY UPDATE: DOL HOT TOPICS UPDATE

Jean Ackerman will be providing a 2014 enforcement and regulatory update for EBSA. What areas of enforcement will the EBSA focus on, both nationally and regionally, in 2014? Will it continue its focus on the Contributory Plans Criminal Project and the Fiduciary Service Provider Compensation Project? How is EBSA handling enforcement issues on new disclosure guidelines and what are its views on the proposed regulation to require a guide to assist plan fiduciaries in reviewing 408(b)(2) Disclosures? How is the DOL handling the new healthcare mandates? What is the current status of the definition of the term "fiduciary" Proposed Rule? We are pleased to have a senior official from the DOL provide her perspective on these and other hot enforcement and regulatory topics, so please join us for this very interesting session.

Speaker:

Jean Ackerman, Regional Director in the U.S. Dept. of Labor's (DOL) (*invited*)

Employee Benefits Security Administration's (EBSA) San Francisco Regional Office

Moderator:

Saswati Paul, Tobin Law

HOW FIT IS YOUR WELLNESS PROGRAM?

Our panel of two plan sponsors and a wellness industry consultant will share their experiences in establishing a successful wellness program. They will discuss topics such as motivating and engaging employees; measuring success; creative ways to make a healthy lifestyle part of the workforce culture; leadership buy-in and measuring financial results.

This interactive workshop will provide insight to the benefits of a successful wellness program, challenges to consider when establishing your plan and creative ways to get employees involved. Bring your questions and join the conversation.

Speakers:

Kathy Wright, Vice President, Human Resources, Jamba Juice

Lynn Marks, Vice President, Human Resources, California Dental Association

Jeff Hull, Vice President, The Melita Group, a boutique employee benefits and HR consulting firm

Moderators:

Jake Bowers and Jane McKeever, Wells Fargo Institutional Retirement and Trust.