

# THE EVOLUTION OF EMPLOYEE BENEFITS - THE TIMES THEY BE A CHANGIN

JCEB Government Invitational  
Royal Sonesta Harbor Court Hotel, 2<sup>nd</sup> Floor  
Baltimore, MD

**March 25-27, 2015**

## **Wednesday, March 25, 2015**

6:00 pm – 7:30 pm – **Opening Reception (Brighton's, 2<sup>nd</sup> floor)**

## **Thursday, March 26, 2015**

7:30 am – 8:30 am – **Breakfast (Whitehall Ballroom Foyer, 2<sup>nd</sup> Floor)**

8:30 am – 8:45 am – **Plenary session and participant introductions** – Please convene promptly

### **I. SESSION I (8:45 am – 12:15 pm) (Whitehall Ballroom, 2<sup>nd</sup> Floor)**

**Retirement Focus** – Presented by the Sections of Labor and Employment Law; Real Property, Trust and Estate Law; and Tort Trial and Insurance Practice and the American Institute of Certified Public Accountants

**Plenary Session Speaker:** (8:45 am – 9:15 am)

Speaker: Sunita Lough, *Commissioner, Tax Exempt and Government Entities Division, Internal Revenue Service, Washington, DC*

[10:40 am – 11:00 am **BREAK**]

### **BREAKOUTS (Repeated Twice 9:25 am – 10:40 am; 11:00 am – 12:15 pm)**

#### **A. Expanded Access to Retirement Plans (Tort Trial and Insurance Practice)**

Moderators: David Cohen, *Evercore Trust Company, NA, Washington, DC*  
Emily Costin, *Alston & Bird LLP, Washington, DC*  
Robert Schwartz, *Trucker Huss APC, San Francisco, CA*  
Catha Worthman, *Lewis, Feinberg, Lee & Jackson, PC, Oakland, CA*

#### **B. Retirement Plan Exit Strategies (Labor and Employment Law)**

Moderators: Al Holifield, *Holifield & Associates, PLLC, Knoxville, TN*  
Joyce Mader, *O'Donoghue & O'Donoghue LLP, Washington, DC*  
Mary Ellen Signorille, *AARP Foundation Litigation, Washington, DC*

- C. 1) Re-examination of the Use of Plan Assets (Real Property, Trust and Estate Law)  
Moderators: Christina M. Crockett, *Ogletree Deakins*, Washington, DC  
Cynthia M. Stamer, *Cynthia Marcotte Stamer, PC*, Dallas, TX  
Henry Talavera, *Polsinelli, PC*, Dallas, TX

- 2) The Changing World of Retirement Plan Investments (American Institute of Certified Public Accountants)  
Moderator: Chris Shankle, *Capital One, NA*, Shreveport, LA

12:30 pm – 1:45 pm – **Lunch (Brighton's, 2<sup>nd</sup> floor)**

**Speaker:** William B. Fornia, *President, Pension Trustee Advisors*, Centennial, CO

## II. **SESSION II (2:00 pm – 5:15 pm)**

**Health Care Focus** – Presented by the Sections of Health Law and Taxation and the American College of Employee Benefits Counsel

**Plenary Session Speaker:** (2:00 pm – 2:20 pm)

J. Mark Iwry, *Senior Advisor to the Secretary and Deputy Assistant Secretary (Retirement and Health Policy), U.S. Department of the Treasury*, Washington, DC

[3:40 pm – 4:00 pm **BREAK**]

**BREAKOUTS (Repeated Twice: 2:25 pm – 3:40 pm; 4:00 pm – 5:15 pm)**

- A. Wellness and the EEOC – What is an Employer Supposed to Do? (American College of Employee Benefits Counsel)  
Moderators: Pamela Baker, *Dentons U.S. LLP*, Chicago  
Kurt Lawson, *Hogan Lovells U.S. LLP*, Washington, DC  
Linda Mendel, *Vorys*, Columbus, OH  
Lissa Paris, *Murtha Cullina LLP*, Hartford, CT  
Mary Ellen Signorille, *AARP Foundation Litigation*, Washington, DC
- B. The Demise of Executive Health Plans – Is There Anything Left? (Health Law)  
Moderators: Jason Lacey, *Foulston Siefkin LLP*, Wichita, KS  
Tiffany N. Santos, *Trucker Huss APC*, San Francisco, CA
- C. HIPAA Privacy and Security and Other Data Breaches – Fiduciary Concerns (Taxation)  
Moderator: Andrew C. Liazos, *McDermott Will & Emery*, Boston, MA  
Julie Burbank, *Chevron Corporation*, San Ramon, CA

5:30 pm – 6:30 pm – **Reception (Whitehall Ballroom Foyer, 2<sup>nd</sup> floor)**

6:30 pm – 8:30 pm – **Dinner (Brighton's, 2<sup>nd</sup> floor)**

**Speaker:** Hon. Phyllis C. Borzi, *Assistant Secretary of Labor, Employee Benefits Security Administration, U.S. Department of Labor, Washington, DC*

## **Friday, March 27, 2015**

7:30 am – 8:30 am – **Breakfast (Whitehall Ballroom Foyer, 2<sup>nd</sup> Floor)**

### **III. SESSION III (8:30 am – 12:00 pm) (Whitehall Ballroom, 2<sup>nd</sup> Floor)**

**Executive Compensation/Other Significant Topics** – Presented by the Sections of Business Law and Taxation and the American Institute of Certified Public Accountants

Introduction to Sessions by Program Coordinators (8:30 am – 8:45 am)

[10:10 am – 10:40 am **BREAK**]

### **BREAKOUTS (Repeated Twice 8:50 am – 10:10 am; 10:40 am – 12:00 pm)**

- A. The Plan Audit of the Future (American Institute of Certified Public Accountants)  
Moderator: Avery Neumark, *Rosen, Seymour, Shapps, Martin & Co.*, New York, NY  
Speaker: Michael Auerbach, *Office of the Chief Accountant, Division of Accounting Services, EBSA, U.S. Department of Labor*, Washington, DC  
Presenters: Karen Field, *KPMG LLP*, Washington, DC  
Wayne Kamenitz, *Ernst & Young LLP*, Iselin, NJ  
Chris Shankle, *Capital One, NA*, Shreveport, LA  
Deborah Walker, *Cherry Bekaert LLP*, Washington, DC
- B. Executive Compensation – Where Will it be 10 Years From Now? (Taxation)  
Moderators: Mark Bordon, *Baker Botts LLP*, Houston, TX  
Kathryn Kennedy, *The John Marshall Law School*, Chicago, IL
- C. Governance and Fiduciary Issues – How the Standards are Changing (Business)  
Moderators: Mitchel Pahl, *Orrick, Herrington & Sutcliffe LLP*, New York, NY  
Charmaine L. Slack, *Jones Day*, New York, NY

12:00 pm – 1:00 pm – **Buffet Lunch – (Brighton's, 2<sup>nd</sup> Floor)**