



# WESTERN PENSION & BENEFITS COUNCIL

## 2018 Spring Conference - Detailed Agenda

### May 2, 2018

#### 7:30-8:00 REGISTRATION & BREAKFAST

Attendee gift sponsored by Perkins and Company  
Breakfast sponsored by Pension Plan Specialists

#### 8:00-8:15 PRESIDENT'S WELCOME

WP&BC Portland Chapter President Mike Walters

#### 8:15-9:45 KEYNOTE SPEAKER: KENI THOMAS

##### What it Means to Lead the Way

Sponsored by Ivy Investments

In the summer of 1993, Sgt. Keni Thomas was deployed to Mogadishu Somalia with Bravo company of the 3rd Ranger Battalion as part of a special operations package called Task Force Ranger. On the 3rd of October, Sgt. Thomas and his fellow rangers distinguished themselves in an 18 hour fire fight that would later be recounted in the highly successful book and movie Blackhawk Down. Keni will talk about "What it Means to Lead the Way." Leadership is the core of every skill developed as a Ranger. But, leadership is not a position but rather an example set by every Ranger. In the pace of life, it is easy to lose perspective on our value to others. Make no mistake: Your presence is crucial! The individuals to the left and right are directly affected by the result of your actions. Each team is a puzzle with invaluable pieces. Keni Thomas helps attendees see themselves in the light of extraordinary. It is a choice made by many each day to impact those around them. It is the ultimate definition of LEADING THE WAY...

#### 10:00-11:00 BREAKOUT SESSION I

##### Room E145 Plan Sponsor FAQs

Joe Burt, Pension Plan Specialists

Frequently asked questions from plan sponsors around day to day retirement plan administration. We discuss how to correct errors, what to do if you miss a payroll, who is eligible and who is not, when do they really enter the plan, what is a hardship withdrawal, etc.

##### Room E146 Health Plans in the Limelight Once Again

Wally Miller, Schwabe, Williamson & Wyatt

The federal overseers of health plan matters have awakened from a short respite, and have become active in issuing new rules and regulations directed to the design and administration of group health and other welfare benefit plans. Wally will bring us up to speed on these new developments, which include proposed regulations on association health plans (AHPs), proposed expansion of limited duration insurance policies, new DOL disability claims procedures, the status of health reimbursement arrangements (HRAs), IRS ACA employer shared responsibility excise tax audit activities, and approaches by various states to circumvent the ACA.

##### Room E147 Environmental, Social and Governance (ESG) Investing

Jae Kim, Neuberger Berman

A growing number of investors are not only looking for attractive performance from their investments but also want their investments to incorporate sustainability criteria. Driven by enhanced participant interest, favorable regulatory guidance, and product developments, plan fiduciaries are increasingly interested in incorporating environmental, social, and governance (ESG) considerations within defined contribution plans.

#### 11:00-11:15 BREAK

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## 11:15-12:15 BREAKOUT SESSION II

### Room E145 **Executive Compensation - Tax, Regulatory & Best Practices**

*Ryan Nisle, Miller Nash Graham & Dunn  
Jack Byrne, Ascend Consulting*

Executive compensation has become a recurring top boardroom topic. An ever-changing tax landscape, a greater focus on accountability, and evolving regulations—combined with a heightened public attention to CEO pay—all intensify demands for effective guidance from in-house counsel. Benefit and pension provisions can add desirable instruments for compensation strategy but come with a further array of challenges.

Two excellent resources will bring their expert insight to present key highlights and answer your questions on best practices and hot topics. Plus all attendees will receive a complimentary one page “Executive Compensation Checkup Checklist” and companion article.

### Room E146 **Direct Purchasing from Providers and RX**

*Chris Larsen, MDsave*

This session will discuss the evolving United States healthcare landscape, with a focus on consumerism, consumer healthcare, and the changing environment across the United States. Chris Larsen will discuss how this relates to employer-based insurance and will describe actions that employers can take to simultaneously reduce cost and enhance quality.

### Room E147 **No One is Average**

*Lynn Avitabile, JP Morgan*

Averages are a staple of individual and DC retirement plans, but they can be misleading—in ways that are not always well-understood. The strongest plans take into account a wide range of life choices and experiences, and do not merely rely on average inputs. This session discusses how changes in key variables can dramatically impact an individual’s retirement outcome. Lynn Avitabile will explain why designing for the edges as well as the average is the best approach.

## 12:15-1:30 LUNCH

*Sponsored by Quest Investment Management, LLC*

### LUNCH KEYNOTE SPEAKER: ANNE GREENWOOD

#### **Invest in Women: The Business Case for Including Women in Corporate Leadership**

Women are underrepresented on boards and in management—yet companies actually perform better when more women are in leadership roles. An overwhelming body of research supports the business case for gender diversity. Companies that embrace gender diversity on their boards and senior management often experience improved performance and profitability as a result. Learn what top strategies companies are using to advance women, how you can be part of the solution—and how you can use this information to engage investors and plan sponsors.

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## 1:45-2:45 BREAKOUT SESSION III

### Room E145 **Cybersecurity: Protecting Your Organization’s Critical Data from Theft and Disaster**

*Francis Tam, Moss Adams*

As evidenced by the continued stream of data breach headlines, cybersecurity is increasingly important in today’s world. This presentation discusses recent trends and cybersecurity incidents. It identifies components of a successful strategy to secure your organization’s critical data from theft and disaster.

### Room E146 **Tax Reform – What It Means for Businesses and Benefits**

*Greg Sherwood, Quest Investment Management*

This session will provide an overview of what tax reform means for businesses and benefit plans. It has been over 30 years since major tax reform and now is the time to identify what is actionable. Who are the winners, who are the losers, and what could be the unintended consequences?

### Room E147 **What to Expect from a DOL-EBSA Investigation**

*Klaus Placke, Department of Labor Employee Benefits Security Administration*

This session will be a discussion of enforcement priorities for the DOL-EBSA. Klaus Placke will also provide examples of common ERISA violations.

## 2:45-3:00 BREAK

## 3:00-4:30 KEYNOTE SPEAKER: RETIREHOLI(K)S

*Sponsored by NUVEEN*

### **Are 401k Disruptors Changing the Industry?**

“The Retireholi(k)s are changing the retirement plan industry one beer at a time.” The show is a slightly inebriated insider’s look into the retirement plan industry. It is the alternative to boring corporate webinars. The cast entertains and informs its viewers with engaging retirement plan talk while enjoying the “beer of the episode” and inserting the occasional 401(k)-related game, prank or hijinks. It’s 401(k) Edutainment!

## 4:00-5:00 HOSTED BAR RECEPTION

*Sponsored by Moss Adams and Voya Financial*

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