



Regional Employee Benefits Forum & Cocktail Reception Forum Agenda

February 15, 2018

5:45 PM – 7:15 PM - Cocktail Reception – Sponsored by Ogletree Deakins

February 16, 2018

7:30 AM - 9:00 AM - Registration and Continental Breakfast

8:50 AM - 9:00 AM - Opening Remarks

9:00 AM - 9:50 AM - Session 1: **Regulatory and Compliance Update for Benefit Plans**

Speakers: **Daniel T. Sulton**, Shareholder, Ogletree, Deakins, Nash, Smoak & Stewart, P.C.

D. Douglas Dorman, Vice President, Human Resources, Greenville Health System

10:00 AM - 10:50 AM - Session 2: **Employer Strategies to Monitor PBM Performance**

Speaker: **Tim Thomas**, Owner, CrystalClearRx

10:50 AM - 11:10 AM - Refreshment Break

11:10 AM - 12:00 PM - Session 3: **Fiduciary Trends and Data Security**

Moderator: **Tom Simonson**, Vice President, Lockton

Speakers: **Ken Janik**, Partner, Nelson Mullins

David Witz, CEO, FRA Plan Tools

12:00 PM - 1:00 PM - Lunch

1:00 PM - 1:50 PM - Session 4: **Blending Health & Wellness with Financial Wellness**

Moderator: **Marti Smith**, Consultant, Lockton

Speakers: **Donn Hess**, Director of Marketing & Communications, Lockton Retirement Services

Melissa Anchia, Health Risk Solutions Consultant, Lockton

1:50 PM - 2:10 PM - Refreshment Break

2:10 PM - 3:00 PM - Session 5: **Preparing for Benefit Plan Audits**

Speaker: **Stephen Pelcher**, Senior Manager, Elliott Davis

3:10 PM – 4:00 PM - Plan Sponsor Roundtable: **Closed-Door Discussion of Plan Issues**

Moderator: **Alanna Tanner**, Director, Employee Benefits, Amick Farms, LLC