October 1-2, 2012

SEBC

Southern Employee Benefits Conference

Monday, October 1, 2012—Georgia Tech Hotel & Conference Center

Hazlehurst Lamon Award and Fall Fly-In Kick-Off Dinner

6:00 p.m.—7:00 p.m. Reception

7:00 p.m.—9:30 p.m. Dinner with Speaker

BURR FORMAN results matter

buckconsultants A Xerox Company

McGUIREWOODS

Tuesday, October 2, 2012—Georgia Tech Global Learning Center

Fall Fly-In 8:00 a.m. to 5:00 p.m.

Healthcare, Investments and Retirement Plans: Looking Ahead

PIMCO Your Global Investment Authority.SM

THE HARTFORD

Nelson Mullins Nelson Mullins Riley & Scarborough LLP

TOWERS WATSON

McGUIREWOODS

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Plan now to join us for a wonderful evening of reconnecting with old and new friends as we present the SEBC's Hazlehurst Lamon Outstanding Achievement Award.

In addition to presenting the award, we will have a very interesting and enlightening presentation "Networking: NOW!" by Nadia Bilchik, former co-host of CNN's Weekend Morning Passport and President of Greater Impact Communications.

In this day of electronic devices everywhere, it is difficult to actually network and really communicate with others. Nadia, a native of from South Africa, will share her experiences as a network anchor both here in the U.S. and in South Africa. She is a dynamic speaker with a great message on how you can build rapport every time you communicate whether in person or in today's world of Blackberrys, i-Phones and other mobile devices. Join us to learn more.

Reception sponsored by BURR FORMAN results matter

Dinner co-sponsored by buckconsultants A Xerox Company McGUIREWOODS

Monday, October 1, 2012—For more Information contact Anne McKillips amckillips@sebc.org

1:30 p.m. -4:00 p.m. Steering Committee Meeting
Georgia Tech Hotel and Conference Center—Dining Room—1st Floor

4:30 p.m. – 6:00 p.m. Long Range Planning Committee Meeting
Georgia Tech Hotel and Conference Center—Dining Room—1st Floor

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Tuesday, October 2, 2012—Georgia Tech Global Learning Center

Fall Fly-In 8:00 a.m. to 5:00 p.m.

Healthcare, Investments and Retirement Plans: Looking Ahead

7:30 a.m. - 3:30 p.m. Registration Desk Sponsored by WEDGE Capital Management

7:30 a.m. – 8:00 a.m. Continental Breakfast
Second Floor Food Break Area

8:00 a.m. – 8:15 a.m. - Conference Opening and Welcome
Drawing for Morning $500 American Express Gift Card
Must be present to win sponsored by BENEFITS LAW GROUP, P.K. KEESLER, P.C.
Jeff Capwell, *SEBC President*
Fred Stewart, *SEBC Program Chair*

OPENING GENERAL SESSION

8:15 a.m. – 10:00 a.m. Benefits: An Employer Perspective

Jennifer Cybul, Vice President Human Resources, DTI, Atlanta, Georgia
Clint Demetriou, Vice President Compensation & Benefits, Graphic Packaging International, Inc., Marietta, GA
Sam Proctor, Assistant Vice President, Benefits & Employee Service Center, Gentiva Health, Atlanta, GA
Elaine Ubakanma, Director Human Resources, H.J. Russell & Company, Atlanta, GA
Moderator: Susan Rosenbleeth, Buck Consultants

Our panel of employers from very different companies will share with us how they approach retirement and health benefits in their respective organizations. Topics to be addressed include:

- How are these employers are handling health benefits in the aftermath of this year's Supreme Court decision?
- What changes have they made in their plans for 2013 and what changes are under consideration for 2014?

Their experiences with fee disclosure for their 401(k) plans, including how have their employees reacted to the disclosures (or didn't react), whether they were able to obtain the necessary information from their covered service providers in a timely and understandable manner and what would they say to providers about the information they provided.

How and what they are communicating with employees about everything from investment returns and fee disclosures in their retirement/savings plans to the increased cost of healthcare and healthcare reform?

Bring your questions; there will be plenty of time for an open dialogue!

⇨10:00 a.m. – 10:15 a.m. Room Change, Cell Phone Time and Continuous Snacks

Continued….

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Fall Fly-In Agenda continued…

10:15 a.m. – 11:20 a.m. CONCURRENT SESSIONS

A) Quagmire from the Supreme Court Decision

Robert B. Davis, J.D., Director, Deloitte Consulting, LLP, Washington, DC
Mark Holloway, J.D., Director of Compliance Services, Lockton Companies, Kansas City, MO
Wayne K. Soud, Jr., Executive Vice President, Lockton Companies, Atlanta, GA
Moderator: **Phil Curran, Ascension Benefits**

The Supreme Court's decision upholding portions of the Patient Protection and Affordable Care Act (PPACA) has settled the issue. Or has it?

Employers must now navigate complex legislative requirements for which there are only a limited number of explanatory regulations. States, responsible for creating much of PPACA's infrastructure, have not all responded as the Obama administration would have hoped. How can employers achieve compliance with PPACA's many requirements? How will compliance be affected by having operations in multiple states? What will happen as a result of the Presidential and Congressional elections this year?

Our panel will discuss these and other issues, as they help you navigate the quagmire of healthcare reform after the Supreme Court decision.

B) Target Date Funds – Which Ones?

Steven J. Geisert, Vice President, PIMCO, New York, NY
Steven Glasgow, CFA, CIMA, AIF, PRP, Senior Vice President, Avondale Partners, LLC, Nashville, TN
***Moderator*:** **Mathew J. Vanaman, CFA, CPA, PIMCO**

We'll hear from a leading investment management firm as they discuss their target date fund (TDF) analysis and from an experienced retirement plan consultant who has worked with numerous employers in their quest for the appropriate TDF options. Topics to be addressed include understanding that TDFs are not all the same (for example, "to" vs. "through" glidepaths), determining the right benchmark for measuring performance, selecting the most appropriate TDF options for a particular plan, determining the right retirement income replacement ratios and what is the future of TDF options.

C) Excessive 401(k) Fees Lawsuit: The Defendant's Perspective

Gregory Braden, Partner, Morgan Lewis, Washington, DC
Sarah A. Zumwalt, Associate, Groom Law Group, Washington, DC
Moderator: **Jeff Capwell, McGuire Woods**

401(k) fees litigation has been bouncing through the courts for almost a decade now and the twists and turns are almost too many to count. The panel will assess where we are, where we have been, and where we may be going in light of recent developments like the implementation of the fees disclosure rules. The panel will also discuss the sole "win" achieved by the plaintiffs' bar thus far, what its ramifications may be for other cases, and what steps plan sponsors and fiduciaries should consider to put themselves in the best position to prevent fees litigation and expeditiously defend it if it hits them.

⇨ 11:20 a.m. – 11:25 a.m. Room Change, Cell Phone Time and Continuous Snacks

Continued….

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Fall Fly-In Agenda continued…

11:25 a.m. – 12:30 p.m. CONCURRENT SESSIONS

A) Leave Absence Management –Managing the Complexities Involved
Jim McConville, Vice President, Disability Products, MetLife Group Disability, Bridgewater, NJ
Jody Hunter, Senior Director Benefits, Koch Business Solutions, Atlanta, GA
Moderator: **Bill Danish, Seacrest Partners**

In the changing world of healthcare, it is easy to lose sight of the importance of leave and absence management in the work force. Studies have shown the costs of employee absences can average 36% of base payroll. How you manage the leave process, both with regard to state and federal legislation and the traditional costs of disabilities has a direct impact on your business.

Further, as employers attempt to quantify the costs of complying with the changes wrought by healthcare reform, and the merits of continuing to offer employer based health plans, the complexities and challenges associated with quantifying and measuring productivity take on new meaning. Leave Absence Management is not for the faint of heart; join us and hear our discussion on managing your programs and quantifying productivity in the workforce

B) Fee Disclosures: Unintended Consequences
Bradley S. Smith, CFA, CEBS, Partner, NEPC, Atlanta, GA
Brant Suddath, Director of Benefits, Home Depot, Atlanta, GA
***Moderator*:** **Tim McCabe, Stadion Money Management**

This year new fee disclosure rules went into effect requiring Employers and other fiduciaries to:

- Receive required disclosures from all Covered Service Providers;
- Use the disclosures to confirm their vendor relationships, the fees and any conflicts of interest;

This session looks at the impact and implications of the Department of Labor new rules on improving fee transparency and disclosure and what impact the rules may have on investment decisions and plan structure. What are the risks and are there any rewards? What has the experience been for employers and employees? This is your opportunity to tap into the experience and knowledge of our panelists from a large employer and a consulting firm.

C) Legislative and Regulatory Update—sponsored by Nelson Mullins — Nelson Mullins Riley & Scarborough LLP
Jennifer Del Nero, Associate Regional Director, EBSA, Department of Labor, Atlanta, GA
Joleah White, Manager, EP R&A Planning Analysis & Reporting, Internal Revenue Service, Atlanta, GA
***Moderator*:** **Martin Sheffield, Natter & Fulmer P.C.**

Attend this session to find out the latest from the DOL and IRS. Catch up on recent policy initiatives and regulatory developments, with a particular focus on enforcement priorities. Questions and dialogue with the audience are key features of this session.

Bring your questions for this always popular-session.

➪12:30 p.m. – 12:45 p.m. Room Change and Cell Phone Time

Continued….

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Fall Fly-In Agenda continued…

12:45 p.m. – 2:15 p.m. LUNCHEON WITH SPEAKER sponsored by

PIMCO
Your Global Investment Authority.SM

***Moderator*: Fred Stewart, Portfolio Evaluations, Inc.**

"Do the Unthinkable" Scott Rigsby

At lunch you will hear the Scott Rigsby story, which is one you will never forget.

Scott was an 18 year old kid on a hot summer day just prior to his first college semester. Riding in the back of a pickup truck in rural Georgia with friends after a hard day of landscaping work. They were talking sports, girls and plans for the weekend, when suddenly he is hit by a passing 18- wheeler, throwing him underneath a 3-ton attached trailer .

Do the Unthinkable is the incredible true story of how Scott Rigsby turned his life around, as a world-class athlete. Doing the unthinkable is not easy. Scott embraced this motto when he decided in 2005 to change his life, and the world, by breaking down barriers for physically challenged athletes. Little did Scott know that his inspirational journey would soon impact generations of able bodied people. Sounds rather trivial until you hear his story of tragedy and one young man's struggle to simply carry on.

➪2:15 p.m. – 2:30 p.m. Room Change and Cell Phone Time

Continued….

Fall Fly-In Agenda continued…

2:30 p.m. – 3:35 p.m. CONCURRENT SESSIONS

A) Annuity Options – Lifetime Income sponsored by The Hartford Mutual Funds

James Veneruso, CFA, Vice President, Callan Associates, Chicago, IL
Abigail Pancoast, Chief Counsel, Retirement Plan Service, Lincoln Financial Group, Radnor, PA
***Moderator*:** Jason Key, Lincoln Financial Group, Charlotte, NC

This session will help you learn more about the evolution of retirement income options and the impact of recent regulatory guidance. Lifetime annuity options are a hot topic now and employers need to understand the many features of these options. Topics to be addressed include the market and regulatory trends, how an employer should go about evaluating the options in the marketplace and the appropriateness for its plan and what developments are on the horizon?

B) Healthcare in a Post-Reform World sponsored by Towers Watson

Richard Novak, President and General Manager, CIGNA Healthcare of Georgia/Alabama, Atlanta, GA
C. Morgan Kendrick, President, Blue Cross and Blue Shield of Georgia, Atlanta, GA
Bradley Towle, MBA, PT, MS , Market President Aetna Accountable Care Solutions, Aetna, Nashville, TN
***Moderator*:** Bill Danish, Seacrest Partners

Join us for a panel discussion featuring the senior leadership from three of the major carriers in the marketplace, Aetna, Blue Cross Blue Shield of Georgia and CIGNA, discuss the coming changes in the healthcare industry.

You will hear about:

- the newly developing Accountable Care Organizations and what it means for you and your employees
- strategies and tactics employed by these carriers in managing the cost of care & promoting employee wellness
- the impact they are seeing and expect to see with the implementation of health care reform.

During this free-wheeling discussion setting, we audience participation is encouraged, so bring your questions!

3:45 p.m.– 4:45 p.m. GENERAL SESSION

Ask the Experts!!!! Healthcare, Retirement and Investments

Healthcare: Tony Holmes, FSA, MAAA, FCA, Partner, Mercer Health and Benefits, Atlanta, GA
Investments: Victor "Vic" A. Bell, Jr., Managing Principal, Senior Advisor, Captrust Financial Advisors, Atlanta, GA
Retirement: Ilene H. Ferenczy, J.D., CPC, APA, Managing Partner, Ferenczy + Paul LLP, Atlanta, GA

We are bringing back this panel as it was so popular last time. We will have experts from the three disciplines to answer your questions. The last time we offered this session we had to end in the midst of discussion due to time constraints, so be prepared to ask your questions right away.

4:45 p.m. - 5:00 p.m. Town Hall Meeting

Jeff Capwell, SEBC President – introduction and welcome of new officers, special recognitions, announcements, etc.

5:00 p.m. Grand Prize Drawing - $500 American Express Gift Card

must be present to win.