

CCA ANNUAL MEETING

Advancing the Practice •
Conference of
Consulting Actuaries
Conferences • Community • Advanced Learning

October 22–25, 2017

**Ritz-Carlton Orlando, Grande Lakes
Orlando, Florida**



REGISTRATION / PRELIMINARY PROGRAM

*The Conference of Consulting Actuaries
is pleased to announce*



**The 2017 CCA Annual Meeting,
Sunday, October 22nd to Wednesday, October 25th, at the
Ritz-Carlton Orlando, Grande Lakes in Orlando, Florida**

These registration materials provide information on the educational sessions, meeting and hotel registration, and an overview of the schedule of events. Individual session information and details on social activities are available through the CCA website at www.ccaactuaries.org.

The meeting registration and session preference form is included here. Use it to

1. Register for the meeting;
2. Reserve space in sessions;
3. Register accompanying persons for the accompanying persons' package; and
4. Register guests for Monday's luncheon.

The Monday Evening Event is included as part of meeting attendee and accompanying person registrations. Travel arrangements and hotel reservations are to be made by the individual attendees. Hotel reservations confirmed with a deposit by **September 18, 2017** (or until the room block is sold out) qualify for the CCA meeting room rate. Reservations after this date, or if our block sells out completely, are subject to availability and may not qualify for the CCA Annual Meeting room rate. Make your reservations early to ensure you get the CCA rate.

If you have any questions, contact the CCA office at 847-719-6500.

The Ritz-Carlton is a wonderful place for this unique educational experience. Mark your calendar and I'll see you in October!

Sincerely,

Richard H. Bailey, III, Secretary
Conference of Consulting Actuaries



Ritz-Carlton Orlando, Grande Lakes

While located near some of America's best-known theme parks, the Ritz-Carlton Orlando, Grande Lakes takes its inspiration from the grand palazzos of Italy. The resort features:

- 11 exceptional dining establishments ranging from poolside al fresco dining to farm-to-table restaurants featuring the resort's on-site organic garden;
- A Fitness Center located in The Ritz-Carlton Spa (complimentary for attendees and their guests staying at the Ritz-Carlton);
- A 40,000-square-foot spa with 40 treatment rooms, an outdoor lap pool, spa café and full salon.
- Three pools: The resort pool, the private lap pool in the spa, and a lazy river pool at the adjacent JW Marriott hotel;
- Three lighted tennis courts;
- 18-hole Greg Norman-signature golf course featuring the optional Ritz-Carlton Golf Caddie Concierge program;
- Adventure Experiences including Eco-Tours, fishing and bird habitats;
- Recreation activities for kids and teens; and of course
- Easy access to world-famous, family-friendly attractions such as Walt Disney World® Resort (10 miles), SeaWorld® (two miles) and Universal Orlando® Resort (10 miles). Shuttle transportation is available to and from Walt Disney World Resort (drop off and pick-up at Magic Kingdom®), SeaWorld and Universal Orlando Resort. Reservations are required 24 hours in advance. Please contact Concierge for details and shuttle schedule. Exclusive for resort registered guests; transportation is included with the resort fee.

Sponsor a CCA Annual Meeting Special Event

Command the attention of the nation's top purchasers and influencers in the marketplace for employee benefits, healthcare services, and public and private pension instruments by becoming a strategic sponsor with the Conference of Consulting Actuaries.

As a sponsor at the CCA Annual Meeting you will gain the opportunity to connect with top-level executives and decision makers across the spectrum, from small business owners to CEOs of multinational consulting firms.

Sponsorship at the CCA Annual Meeting is a powerful customer relationship management vehicle. Be recognized as a valued sponsor in the pre- and post-event marketing materials and create a dynamic impression on the nation's top actuaries.

**Be a
Strategic
Sponsor!**

Reservations

Visit <http://www.ccaactuar.org/go/amhotel> to make your reservations online at the Ritz-Carlton Orlando, Grande Lakes or call 800-266-9432 and request a room in the Conference of Consulting Actuaries' (CCA) room block.

The CCA reserves a block of rooms at the Ritz-Carlton Orlando, Grande Lakes. The group rate of \$229* per night for single or double occupancy, excluding tax, is available on a first-come, first-served basis through September 18, 2017 or until the room block is sold out. After this date, or if our block sells out completely, additional rooms may be sold based on availability and may not qualify for the group rate. We expect to completely sell out our room block before the cutoff date, so please make your reservation as soon as possible.

Should you encounter any difficulty, please contact the CCA office immediately at 847-719-6500 for assistance.

* Attendees may also purchase an optional resort fee of \$20 at the time of check in. This fee covers multiple amenities and services which include:

- Enhanced high-speed guest room internet and common areas of the hotel (Marriott Rewards members receive complimentary internet access in guest rooms);
- Complimentary general bandwidth in the meeting space and public areas of the hotel;
- Unlimited local and domestic long distance calls;
- Shuttle transportation to SeaWorld, Universal Studios and Disney World Orlando (for individuals only. Reservations required 24 hrs. in advance);
- Two pool floats;
- Driving range privileges;
- Daily selected recreational activities;
- Daily credit of up to \$10 per room towards dry cleaning (credit is not cumulative through stay);
- Ritz Kids Daily Program (Noon–5 PM) two hours, two children ages 4-12 complimentary; and
- Daily bike rental through Grande Lakes Sports – 2 bikes complimentary for 1 hour per guest room.

Travel Information

The Ritz-Carlton Orlando, Grande Lakes is located 12 miles west of Orlando International Airport. The estimated one-way taxi fare between the airport and the Ritz-Carlton is \$30 (tip not included).

Transportation to and from Orlando International Airport is also available through the Ritz-Carlton's Concierge at 407-393-4060. Rates are \$65 from the airport to the hotel and \$50 from the hotel to the airport.

Daily Parking on Property

Should you choose to rent a car during your stay at the CCA Annual Meeting, please note that there is a daily self-parking fee of \$12 plus tax. Valet parking is also available for \$22 plus tax and tip.



Why Stay at the Official Hotel?

By fully supporting the host hotel you'll be able to:

- Receive the negotiated room rate for the meeting and in-room internet access;
- Relax in a resort setting;
- Maximize your networking opportunities;
- Save your valuable time and energy otherwise spent commuting to the official site; and
- Maintain CCA's pricing model, keeping future registration costs down, while experiencing top resorts.

In order to bring you reasonably priced, high-quality meetings at desirable sites, it is necessary to reserve blocks of guest rooms. In exchange for filling these rooms, CCA is allowed to use the hotel's meeting facilities, keeping your registration fees reasonable.

In addition, you'll receive reduced rates for your room over leisure travelers.



Meeting Highlights



Keynote Speaker: Vanessa Van Edwards *FOUNDER, SCIENCEOFPEOPLE.COM*

Monday, October 23, 7:45–10:15 AM

Vanessa Van Edwards is a published author and behavioral investigator. She is a professional people watcher—speaking, researching and cracking the code of interesting human behavior for audiences around the world. Vanessa’s groundbreaking workshops and courses teach individuals how to succeed in business and life by understanding the hidden dynamics of people. Vanessa is a Huffington Post columnist and Penguin author. She has been featured on NPR, the Wall Street Journal, the Today Show and USA Today. She has written for CNN, Fast Company and Forbes.

Vanessa has spoken to groups across the globe from the stage at the Consumer Electronic Show to presenting research at MIT. She has used her research to consult for numerous Fortune 500 companies including American Express, Clean and Clear and Symantec.

She graduated Magna Cum Laude from Emory University in 2007 and is SETT certified with Dr. Paul Ekman, SUBx certified, and is a member of the Association of Certified Fraud Examiners and certified in Statement Analysis.

MONDAY EVENING EVENT

Monday, October 23, 6:30 PM – 9:30 PM

This year the Monday Evening Event takes place on-site at the Ritz-Carlton Orlando, Grande Lakes. You and your registered accompanying persons are treated to an informal and relaxed event where you’ll dine and dance on the Da Vinci Lawn and Terrace.

This is a great opportunity to unwind away from the meeting and spend social time with your peers.

These are evenings to remember!



TUESDAY AFTERNOON NETWORKING FORUMS

Tuesday, October 24, 3:15 PM

Several of the CCA communities and special interest groups (SIGs) schedule a networking forum to allow these year-round common interest groups the opportunity to meet face-to-face. Feel free to stop by, meet, and discuss current issues, news, and outlooks. Community/SIG membership is not required to attend these on-site events. The following forums are currently scheduled:

Public Plans Networking Forum

Facilitated by the CCA Public Plans Community

Healthcare Networking Forum

Facilitated by the CCA Healthcare Community

Smaller Actuarial Consulting Firms Networking Forum

Facilitated by the CCA Smaller Actuarial Consulting Firms SIG



Registered attendees can view an updated list of dates and times for additional networking forums through the 2017 CCA Annual Meeting Community at <http://www.ccactuaries.org/go/annualmeetingcommunity>.



RETIREE MEDICAL SEMINAR*

Sunday, October 22 – Noon – 6:00 PM

This seminar serves as a primer for working on retiree group benefit valuations. Whether you are undertaking ASC715 or GASB 45/74/75 valuations, the fundamentals are the same. Attendees receive a copy of the textbook used on the Society of Actuaries' exams, "Fundamentals of Retiree Group Benefits," and the seminar material closely follow its contents.

The speakers at this seminar cover:

1. Trends in retiree medical plan design.
2. Actuarial assumptions and methods.
3. Pros and cons of RDS and EGWP.
4. How Medicare Advantage Plans work – and why the premium cost for Medicare Advantage plans are generally lower than Medicare Supplement premiums.
5. Morbidity tables – sources and uses.
6. My retiree medical plan client is being audited – what to expect when the auditor's actuary reviews the valuation – and how to plan for a smooth audit review.

** This seminar is not a part of the Annual Meeting package; with additional registration and fees required. Registration fees for the seminar are as follows: Members \$550 – Nonmembers \$650
Additional late and cancellation fees apply. See Refund Policy for details.*



A GREEN ANNUAL MEETING

Since 2014, the CCA Annual Meeting has provided registered meeting attendees with online access to electronic versions of meeting materials immediately prior to the meeting and during the meeting through either the meeting app or the CCA website. Registered attendees receive specific instructions in advance of the meeting on how to access these materials.

If you require paper copies of handouts, you need to print your materials prior to your arrival at the CCA Annual Meeting. Printers are available in the Ritz-Carlton's business office for charge to the individual.



Registration

The registration fee for meeting attendees includes:

- Access to Session Presentations;
- Monday Evening Event;
- Refreshment Breaks;
- Monday Luncheon; and
- Continental Breakfast on Monday, Tuesday, and Wednesday.

Online registration with AMEX, MasterCard or Visa is available via the CCA website at www.ccactuaries.org. You may also complete the PDF version of the registration form, indicating your session preferences, then mail your completed form with a check made payable to the Conference of Consulting Actuaries. Registrations are not processed without the appropriate payment.

By registering for an event organized by the CCA you agree to comply with and be bound by the applicable registration/cancellation terms and conditions set forth in this program. The CCA reserves the right to close registration to prevent overcrowding of the meeting space reserved for this event.

Registration Fees*

EARLY BIRD June 15 – July 31	CCA Member: \$1,195
	Non-member: \$1,645
REGULAR August 1 – Sept. 15	CCA Member: \$1,295
	Non-member: \$1,745
LATE Sept. 16 – Oct. 6	CCA Member: \$1,395
	Non-member: \$1,845
ONSITE Oct. 7 – 25	CCA Member: \$1,495
	Non-member: \$1,945

Accompanying Persons

The registration fee for an accompanying person (\$175 for persons age 18 and over, and \$125 for persons age 3-17) includes the following:

- Continental Breakfast on Monday, Tuesday, and Wednesday
- Monday Evening Event

An additional fee of \$65 is required for the Monday Luncheon for all persons who are not registered meeting attendees.

* Become a CCA Member for 2018 When You Register as a Nonmember Attendee for the Annual Meeting

If you have never been a CCA member and you're planning to attend the CCA Annual Meeting, we have an amazing offer for you. The CCA offers a special arrangement for any nonmember attendee wishing to become a CCA member for the **first time**. Attendees who pay the nonmember fee, submit a completed CCA membership application between the Annual Meeting and November 30, 2017, and are approved for membership, receive a waiver of first-year membership dues (currently a savings of \$425).

Take advantage of this special offer and you'll have access to the CCA's 2018 audio/webcast series, seminars and other meetings at member rates, and you'll gain access to the CCA's many community forums. You owe it to yourself and your career to sample these communities where you'll stay on top of the latest developments in these varied, interesting, and sometimes volatile areas. At times, the community focus has been to help frame the national debate on actuarial issues for the profession.

[Click here for details.](#)

Refund Policy

Each registration is offered as a package. Refunds are not issued for any portion of the package not used by the attendee or guest. Refunds are based on the date the written request is postmarked or received via email in the CCA office, according to the schedule below.

	Up to July 31	August 1 to Sept. 15	After Sept. 15
Attendee	Full refund less \$100 admin. fee	50% of registration fee	NO REFUND
Accompanying Person Registration	Full refund less 50% admin. fee	NO REFUND	NO REFUND
Retiree Medical Seminar	Full refund less \$100 admin. fee	50% of registration fee	NO REFUND

In order to qualify, requests for refunds must be made in writing and postmarked or received via e-mail in the CCA office by the above specified dates.

Conference of Consulting Actuaries
3880 Salem Lake Drive, Suite H
Long Grove, IL 60047-5292
E-mail: conference@ccactuaries.org

Concurrent Sessions

We encourage you to register early as sessions are filled on a first-come, first-served basis and sometimes close. We reserve the right to limit the number of registrations for individual sessions, as well as for the meeting. If you are not registering online, please complete and mail the session preference form to indicate your desired attendance in various sessions. Select a second and third choice for each time slot in case your first choice is not available.

Within two weeks of receiving your registration form accompanied by full payment, we'll issue a confirmation that will provide you an opportunity to verify the details of your registration and session selections.

CCA's Required Continuing Education Program

CCA members attending the Annual Meeting have the opportunity to earn up to 19 of the 30 required credits toward the 2017 continuing education requirement (including up to 4 professionalism credits) as every session qualifies for credit. We believe all sessions are applicable for credit under the Qualification Standards.

[Click Here](#) for more information about the CCA's Required Continuing Education Program.

EA Continuing Education Requirement

Enrolled Actuaries can earn up to 17.5* credit hours of continuing education credits at the 2017 CCA Annual Meeting. All sessions that qualify for EA credit also qualify for EA Formal credit under the Joint Board for the Enrollment of Actuaries (JBEA) requirements. Total credits include 2.5* EA Core credits for the Tuesday afternoon session, "Professionalism in Theory and Practice." The closing session, "A Tip of the Hat to Ethics" also qualifies for 1.5 EA Ethics credit.

*Please note that the proposed EA credits listed for all sessions in this brochure are subject to the final approval by the JBEA. When filing for renewal of enrollment with the JBEA or other credentialing organizations, it is the individual's responsibility to determine any redundancy of topics and/or content between the sessions attended for each renewal period. As the sponsor of continuing education, we try to note sessions that might have significant overlap, but the ultimate responsibility for claiming credits rests with the individual actuary.

Cancellation Policy

As warranted by unforeseen events, CCA reserves the right to cancel the meeting. In the unlikely occurrence of such an event, registration fees charged by CCA will be refunded. However, CCA will not be held liable for any airline, hotel, or other penalties that may be assessed to attendees as a result of a potential cancellation.

Photography and Videography Policy

In consideration for your opportunity to attend this CCA hosted meeting, any ancillary seminars and the luncheon, your registration constitutes your consent to CCA's use of your image and likeness or voice for educational and or promotional purposes. By registering to attend; you release CCA, its employees, agents, successors and assigns, from any and all claims which may arise out of participation in a photo or video shoot and the use of your photograph, video and or likeness.

No Session Recording

No sessions of the CCA Annual Meeting are recorded. As a condition of your attendance at the meeting, you agree not to audio or video record any portion of the educational sessions held at the meeting. Any violation of this condition may result in your ejection from the meeting without a refund of your registration fee. In addition, you agree that the CCA shall be entitled to any costs incurred as a result of any violation of this provision, including payment of CCA's attorneys' fees. Violators may be prohibited from attending future meetings/events.

Antitrust Policy Applicability of Antitrust Laws

Professional societies, including the Conference of Consulting Actuaries, are subject to federal and state antitrust laws, and must constantly monitor their activities to ensure continued compliance with all antitrust regulations.

Purpose of Antitrust Laws

The antitrust laws prohibit any concerted activity or combination of competitors from interfering with free competition. In other words, the primary thrust of the law is to control private economic power by protecting competition. Persons and organizations are prohibited from engaging in any action which unreasonably restrains commerce or trade (i.e., competition). Per se violations (practices presumed to be inherently wrong regardless of the motivating factors) include: agreements to fix or stabilize prices, to divide markets, to allocate production, or to impose boycotts. In essence, this means any concerted action that significantly diminishes rivalry among competing firms.

The CCA's Policy

The Board of Directors of the Conference of Consulting Actuaries intends adherence to the antitrust laws. The CCA provides guidance on compliance by regularly communicating to our membership, attendees at our continuing education offerings, and committee/task force meetings regarding both the applicability and purpose of antitrust laws.

CONFERENCE:***THE CCA ANNUAL MEETING APP***

If you want to enhance your CCA Annual Meeting experience, download "Conference: CCA Conference App" for your mobile device. The app provides you with the following features:

- Updated meeting program;
- Attendee roster;
- Speaker information;
- Session handouts;
- Maps of the meeting rooms;
- Updates from the meeting organizers; and
- Twitter feed for the meeting (use #CCA17 to add your own comments).

You and your guests can also use the built-in concierge to schedule a spa visit, find other onsite activities, or make reservations and review the menus of the onsite dining options. Access the free CCA app with your smartphone or tablet and make the most of your time when you're with us, Advancing the Practice.®



www.ccactuaries.org/go/apple



www.ccactuaries.org/go/android



www.ccactuaries.org/go/appaccess

Community

Once you've registered for the CCA Annual Meeting, you have access to the CCA's Community site for the 2017 CCA Annual Meeting at <http://www.ccactuaries.org/go/annualmeetingcommunity>. This platform allows attendees to network with fellow attendees, ask questions about planned sessions, and access PDF versions of session handouts.

Note: The website requires you to provide your login information when accessing the site. Please use the login information you use to register for the meeting on the CCA website, as creating a new user account does not permit you to access the site. If you do not have your password, you may request an e-mail containing your password at the bottom of the login page.



PROGRAM SUMMARY

To view the complete program, including session titles, descriptions, credits, and speakers; visit the CCA website at <http://www.ccactuaries.org/go/annualmeeting>.

Sunday, October 22

5:15 PM–6:55 PM Session 001: A Primer on Investment and Related Issues

Monday, October 23

7:00 AM–8:00 AM Continental Breakfast

7:45 AM–10:15 AM Opening Remarks/Business Session
Session 002: Keynote Speaker Vanessa Van Edwards

10:15 AM–10:45 AM Refreshment Break

10:45 AM–Noon Track 1: Sessions 101–108

Noon–1:30 PM Annual Meeting Networking Luncheon

2:00 PM–3:15 PM Track 2: Sessions 201–208

3:15 PM–3:45 PM Refreshment Break

3:45 PM–5:00 PM Track 3: Sessions 301–308

6:30 PM–9:30 PM Monday Evening Event

Tuesday, October 24

7:00 AM–8:00 AM Continental Breakfast

8:00 AM–9:40 AM Track 4: Sessions 401–408

9:40 AM–10:10 AM Refreshment Break

10:10 AM–11:50 AM Track 5: Sessions 501–508

1:00 PM–3:05 PM Tuesday Afternoon Session
Session 003: Professionalism in Theory and Practice

3:15 PM CCA Networking Forums:
Public Plans Networking Forum
Healthcare Networking Forum
Smaller Actuarial Consulting Firms Networking Forum

Wednesday, October 25

7:00 AM–8:00 AM Continental Breakfast

8:00 AM–9:15 AM Track 6: Sessions 601–608

9:15 AM–9:30 AM Refreshment Break

9:30 AM–10:45 AM Track 7: Sessions 701–708

10:45 AM–11:00 AM Refreshment Break

11:00 AM–12:30 PM General Session
Session 004: A Tip of the Hat to Ethics

2017 CCA Annual Meeting Registration Form



Full Name _____
 Name on Badge _____
 Address _____
 City _____ State _____ Zip _____
 Phone _____

Email _____
 Company _____
 Title _____
 Name(s) of Accompanying Person(s) _____

Register online or complete this page and, if necessary, the session preference form and return it with the appropriate fee (payable in US funds) to the:

Conference of Consulting Actuaries
3880 Salem Lake Drive, Suite H
Long Grove, IL 60047-5292

Registration forms received without payment are not processed until payment is received. Rate is determined by the postmarked date of the registration payment.

Payments received by mail are based on the US Postal Service postmark dates.

The Conference of Consulting Actuaries is dedicated to serving all attendees. If you require any accommodations to participate in the 2017 CCA Annual Meeting, please indicate below:



Meeting Registration

Includes: Meeting Materials, Monday Evening's Gala Event, Refreshment Breaks, Monday Luncheon, Continental Breakfasts Monday, Tuesday and Wednesday

Early Bird June 15 – July 31	CCA Member	\$1,195	
	Non-member	\$1,645	
Regular August 1 – Sept. 15	CCA Member	\$1,295	
	Non-member	\$1,745	
Late Sept. 16 – Oct. 6	CCA Member	\$1,395	
	Non-member	\$1,845	
Onsite Oct. 7 – 25	CCA Member	\$1,495	
	Non-member	\$1,945	

Accompanying Person Fee

May be purchased only in conjunction with above Meeting Registration

Continental Breakfasts & Monday Evening Event	ages 18 & over	\$175 per person	
	ages 3–17	\$125 per person	
Monday Luncheon		\$65 per person	

Special Meal Request

Complimentary with all above, but only available on registrations purchased before 9/15/2017

Monday Luncheon	Kosher	
	Vegetarian	
Monday Evening Event	Kosher	

Retiree Medical Seminar

Registrations received two weeks or less before seminar are an additional \$100	CCA Member	\$550	
	Non-member	\$650	

MEETING FEE TOTAL

Office use only:

Amt. Paid _____
 Check # _____

By registering for an event organized by the CCA you agree to comply with and be bound by the applicable registration/cancellation terms and conditions set forth in this program. The CCA reserves the right to close registration to prevent overcrowding of the meeting space reserved for this event.

For the most up-to-date information and attendee list, visit our website at: WWW.CCACTUARIES.ORG

2017 CCA Annual Meeting Session Preference Form



PLEASE INDICATE THE SESSION YOU WOULD LIKE TO ATTEND BY WRITING A NUMBER **1, 2, AND 3** IN EACH TIME SLOT FOR YOUR FIRST, SECOND, AND THIRD CHOICE. YOU WILL BE GIVEN YOUR FIRST CHOICE WHERE SPACE IS AVAILABLE.

Sunday, October 22

5:15 – 6:55 PM

___ 001 A Primer on Investment and Related Issues

Monday, October 23

7:45 – 10:15 AM

___ 002 Business Session and Keynote Speaker Vanessa Van Edwards

10:45 AM–NOON

- ___ 101 Q&N/As: Things We Don't Know
- ___ 102 Impact of Low Current Rates on Investment Return Assumptions
- ___ 103 Withdrawal Liability — A 360 Perspective
- ___ 104 Medicare Advantage and Part D Workshop
- ___ 105 Specialty Drugs Conquer the World (If We Let Them)
- ___ 106 O Canada — Recent Developments North of the Border
- ___ 107 Role/Responsibility of the Public Sector Actuary – Can You Hear Me Now?
- ___ 108 Actuaries in Non-Traditional Corporate Roles

2:00 – 3:15 PM

- ___ 201 Retirement Implications of Living Longer
- ___ 202 Dialogue With the PBGC
- ___ 203 Hybrid Plan Design and Operation
- ___ 204 MACRA and the Medicare Side of ACA
- ___ 205 Out of Network Shared Savings Solutions
- ___ 206 Buyer Beware! Helping Non-US Companies Navigate a Domestic Deal
- ___ 207 UAAL: How Did We Get Here?
- ___ 208 View From Inside the Beltway

3:45 – 5:00 PM

- ___ 301 IFRS Accounting for Retirement Plans
- ___ 302 DC Plans: Designs and Testing
- ___ 303 Pension Plan Administration and Practical Guide to EPCRS
- ___ 304 Are You Ready to Move From Reactive to Predictive Medicine?
- ___ 305 New Health Plan Market Entrants
- ___ 306 Choosing Discount Rates for Withdrawal Liability
- ___ 307 Legislative Update and Future Challenges “Under New Management”
- ___ 308 Managing Professional Liability Risk

Tuesday, October 24

8:00 – 9:40 AM

- ___ 401 Late Breaking Developments
- ___ 402 Memento Mori: The Mortality Assumption and New IRS Regulations
- ___ 403 Plan Exit Strategy
- ___ 404 The State of the ACA
- ___ 405 The RWJ Actuarial Challenge: And the Winners Are...
- ___ 406 The New Nationalism — How Would Trade Barriers Affect Employment, Pay, and Benefits?
- ___ 407 Setting the Investment Return Assumption for Public Plans
- ___ 408 Evolution (or Revolution) in Total Rewards

10:10 – 11:50 AM

- ___ 501 An In-Depth Look at Annuity Purchases
- ___ 502 Effectively Working With Clients' External Auditors
- ___ 503 Losing Interest? Assumptions Beyond the Discount Rate
- ___ 504 To an Exchange... and Beyond!
- ___ 505 Bringing New Prescription Drugs to Market
- ___ 506 National Healthcare Models Around the World—Effective Alternative Approaches
- ___ 507 Risk is the Word — Evaluating and Communicating Risk for Public Pension Plans
- ___ 508 Hear What Clients are Looking for in an Advisor

1:00 – 3:05 PM

- ___ 003 Professionalism in Theory and Practice

3:15 PM

- ___ Public Plans Networking Forum
- ___ Healthcare Networking Forum
- ___ Smaller Actuarial Consulting Firms Networking Forum

Wednesday, October 25

8:00 – 9:15 AM

- ___ 601 Working With the PBGC: Understanding the Regulator and Strategies for Your Clients
- ___ 602 Innovations in DC Plans
- ___ 603 Cost Accounting Reimbursement for Government Contractors — A Deeper Dive
- ___ 604 Macroeconomics Approach to Healthcare
- ___ 605 Concierge Medicine
- ___ 606 Looks Can be Deceiving—DB Plans in Disguise
- ___ 607 Mortality in All its Glory (Part 1)
- ___ 608 Captive Insurance and Employee Benefits

9:30 – 10:45 AM

- ___ 701 Retirement Patterns — Whistle While You Work?
- ___ 702 Small Plan Design Issues
- ___ 703 LDI—Win/Lose Scenarios as Interest Rates Change
- ___ 704 What Can You Learn From the Medicare Technical Panel?
- ___ 705 Embracing Rejection: SOB Letters
- ___ 706 Non-US Defined Contribution Plan Governance
- ___ 707 Public Plans Open Forum
- ___ 708 Effective Communications

11:00 AM – 12:30 PM

- ___ 004 A Tip of the Hat to Ethics

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2017 CONFERENCE OF CONSULTING ACTUARIES ANNUAL MEETING

Sunday, Oct. 22 5:15–6:55 PM	Monday, Oct. 23 10:45 AM–Noon	Monday, Oct. 23 2:00–3:15 PM	Monday, Oct. 23 3:45–5:00 PM	Tuesday, Oct. 24 8:00–9:40 AM	Tuesday, Oct. 24 10:10–11:50 AM	Wednesday, Oct. 25 8:00–9:15 AM	Wednesday Oct. 25 9:30–10:45 AM
001 A PRIMER ON INVESTMENT AND RELATED ISSUES <i>EA Noncore 2.0, CPD 2.0</i>	101 Q&N/AS: THINGS WE DON'T KNOW <i>EA Core 1.5, CPD 1.5</i>	201 RETIREMENT IMPLICATIONS OF LIVING LONGER <i>EA Noncore 1.5, CPD 1.5</i>	301 IFRS ACCOUNTING FOR RETIREMENT PLANS <i>EA Noncore 1.5, CPD 1.5</i>	401 LATE BREAKING DEVELOPMENTS <i>EA Core 2.0, CPD 2.0</i>	501 AN IN-DEPTH LOOK AT ANNUITY PURCHASES <i>EA Core 1.00, EA Noncore 1.00, CPD 2.0</i>	601 WORKING WITH THE PBGC: UNDERSTANDING THE REGULATOR & STRATEGIES... <i>EA Core 1.5, CPD 1.5</i>	701 RETIREMENT PATTERNS — WHISTLE WHILE YOU WORK? <i>EA Noncore 1.5, CPD 1.5</i>
KEY <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">PENSION</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">MULTIEMPLOYER PLANS</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">HEALTHCARE</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">INTERNATIONAL</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">PUBLIC PLANS</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">CROSS DISCIPLINE</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">INVESTMENTS</div>	102 IMPACT OF LOW CURRENT RATES ON INVESTMENT RETURN ASSUMPTIONS <i>EA Noncore 1.5, CPD 1.5</i>	202 DIALOGUE WITH THE PBGC <i>EA Core 1.5, CPD 1.5</i>	302 DC PLANS: DESIGNS AND TESTING <i>Pension EA Noncore 1.5, CPD 1.5</i>	402 MEMENTO MORI: THE MORTALITY ASSUMPTION AND NEW IRS REGULATIONS <i>EA Core 2.0, CPD 2.0</i>	502 EFFECTIVELY WORKING WITH CLIENTS' EXTERNAL AUDITORS <i>EA Noncore 2.0, CPD 2.0</i>	602 INNOVATIONS IN DC PLANS <i>EA Noncore 1.5, CPD 1.5</i>	702 SMALL PLAN DESIGN ISSUES <i>EA Core 1.5, CPD 1.5</i>
	103 WITHDRAWAL LIABILITY—A 360 PERSPECTIVE <i>EA Core 1.5, CPD 1.5</i>	203 HYBRID PLAN DESIGN AND OPERATION <i>EA Core 0.75, EA Noncore 0.75, CPD 1.5</i>	303 PENSION PLAN ADMINISTRATION AND PRACTICAL GUIDE TO EPCRS <i>EA Core 1.5, CPD 1.5</i>	403 PLAN EXIT STRATEGY <i>EA Core 1.0, EA Noncore 1.0, CPD 2.0</i>	503 LOSING INTEREST? ASSUMPTIONS BEYOND THE DISCOUNT RATE <i>EA Core 2.0, CPD 2.0</i>	603 COST ACCOUNTING REIMBURSEMENT FOR GOVERNMENT CONTRACTORS... <i>EA Noncore 1.5, CPD 1.5</i>	703 LDI—WIN/LOSE SCENARIOS AS INTEREST RATES CHANGE <i>EA Noncore 1.5, CPD 1.5</i>
	104 MEDICARE ADVANTAGE & PART D WORKSHOP <i>CPD 1.5</i>	204 MACRA AND THE MEDICARE SIDE OF ACA <i>CPD 1.5</i>	304 ARE YOU READY TO MOVE FROM REACTIVE TO PREDICTIVE MEDICINE? <i>CPD 1.5</i>	404 THE STATE OF THE ACA <i>CPD 2.0</i>	504 TO AN EXCHANGE... AND BEYOND! <i>CPD 2.0</i>	604 MACROECONOMICS APPROACH TO HEALTHCARE <i>CPD 1.5</i>	704 WHAT CAN YOU LEARN FROM THE MEDICARE TECHNICAL PANEL? <i>CPD 1.5</i>
	105 SPECIALTY DRUGS CONQUER THE WORLD (IF WE LET THEM) <i>CPD 1.5</i>	205 OUT OF NETWORK SHARED SAVINGS SOLUTIONS <i>CPD 1.5</i>	305 NEW HEALTH PLAN MARKET ENTRANTS <i>CPD 1.5</i>	405 THE RWJ ACTUARIAL CHALLENGE: AND THE WINNERS ARE... <i>CPD 2.0</i>	505 BRINGING NEW PRESCRIPTION DRUGS TO MARKET <i>CPD 2.0</i>	605 CONCIERGE MEDICINE <i>CPD 1.5</i>	705 EMBRACING REJECTION: SOB LETTERS <i>EA Core 1.5, CPD 1.5</i>
	106 O CANADA — RECENT DEVELOPMENTS NORTH OF THE BORDER <i>EA Noncore 1.5, CPD 1.5</i>	206 BUYER BEWARE! HELPING NON-US COMPANIES NAVIGATE A DOMESTIC DEAL <i>EA Noncore 1.5, CPD 1.5</i>	306 CHOOSING DISCOUNT RATES FOR WITHDRAWAL LIABILITY <i>EA Core 1.5, CPD 1.5</i>	406 THE NEW NATIONALISM—HOW WOULD TRADE BARRIERS AFFECT EMPLOYMENT, PAY, AND BENEFITS? <i>CPD 2.0</i>	506 NATIONAL HEALTHCARE MODELS AROUND THE WORLD—EFFECTIVE ALTERNATIVE APPROACHES <i>CPD 2.0</i>	606 LOOKS CAN BE DECEIVING—DB PLANS IN DISGUISE <i>EA Noncore 1.5, CPD 1.5</i>	706 NON-US DEFINED CONTRIBUTION PLAN GOVERNANCE <i>EA Noncore 1.5, CPD 1.5</i>
	107 ROLE/RESPONSIBILITY OF THE PUBLIC SECTOR ACTUARY—CAN YOU HEAR ME NOW? <i>EA Noncore 1.5, CPD 1.5</i>	207 UAAL: HOW DID WE GET HERE? <i>EA Noncore 1.5, CPD 1.5</i>	307 LEGISLATIVE UPDATE AND FUTURE CHALLENGES “UNDER NEW MANAGEMENT” <i>EA Noncore 1.5, CPD 1.5</i>	407 SETTING THE INVESTMENT RETURN ASSUMPTION FOR PUBLIC PLANS <i>EA Core 2.0, CPD 2.0</i>	507 RISK IS THE WORD — EVALUATING AND COMMUNICATING RISK FOR PUBLIC PENSION PLANS <i>EA Core 1.00, EA Noncore 1.00, CPD 2.0</i>	607 MORTALITY IN ALL ITS GLORY (PART 1) <i>EA Core 0.75, EA Noncore 0.75, CPD 1.5</i>	707 PUBLIC PLANS OPEN FORUM <i>EA Noncore 1.5, CPD 1.5</i>
	002 BUSINESS SESSION & KEYNOTE SPEAKER VANESSA VAN EDWARDS <i>CPD 1.5</i>	108 ACTUARIES IN NON-TRADITIONAL CORPORATE ROLES <i>EA Noncore 1.5, CPD 1.5</i>	208 VIEW FROM INSIDE THE BELTWAY <i>EA Noncore 1.5, CPD 1.5</i>	308 MANAGING PROFESSIONAL LIABILITY RISK <i>EA Core 1.5, CPD 1.5</i>	408 EVOLUTION (OR REVOLUTION) IN TOTAL REWARDS <i>EA Noncore 2.0, CPD 2.0</i>	508 HEAR WHAT CLIENTS ARE LOOKING FOR IN AN ADVISOR <i>EA Noncore 2.0, CPD 2.0</i>	608 CAPTIVE INSURANCE AND EMPLOYEE BENEFITS <i>CPD 1.5</i>

Ritz-Carlton Orlando, Grande Lakes
Orlando, Florida



Tuesday, Oct. 24 1:00 – 3:05 PM	003 PROFESSIONALISM IN THEORY & PRACTICE <i>EA Core 2.50, CPD 2.50</i>
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Wednesday, Oct. 25 11:00 AM – 12:30 PM	004 A TIP OF THE HAT TO ETHICS <i>EA Ethics 1.5, CPD 1.5</i>
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