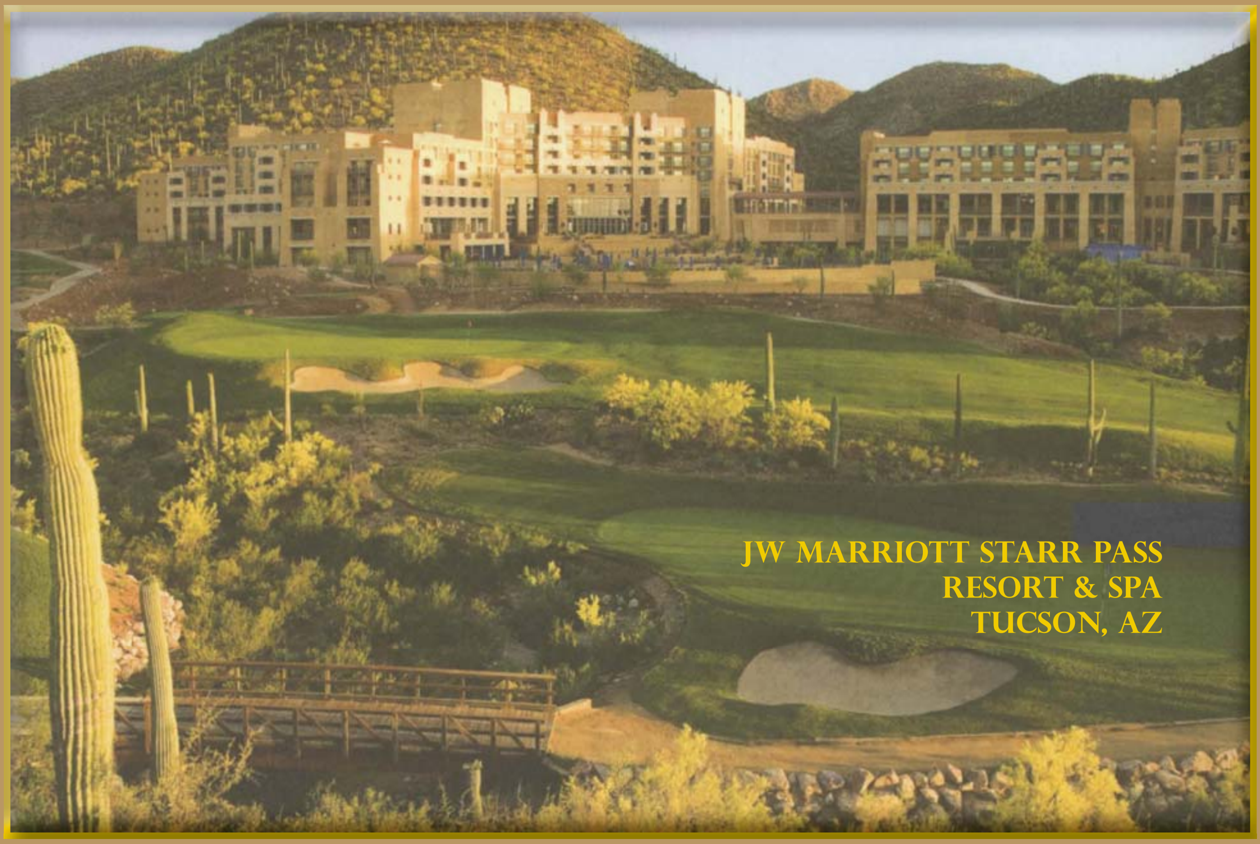
CONFERENCE OF CONSULTING ACTUARIES

2009 ANNUAL MEETING

NOVEMBER 1 - 4



PRELIMINARY PROGRAM
REGISTRATION INFORMATION

"OUTSTANDING CONTENT AND EFFECTIVE PRESENTERS!"

"GREAT NETWORKING OPPORTUNITIES - GOOD WAY TO MEET NEW PEOPLE"

"SUPERIOR TO ANY OTHER CONFERENCE I'VE ATTENDED"

"THE PREMIER MEETING FOR CONSULTING ACTUARIES"

PROGRAM SUMMARY
2009 CCA Annual Meeting - JW Marriott Starr Pass Resort & Spa

Sunday, Nov. 1 5:00 – 7:05 PM

Sunday Session 1
Gray Book Review
CE/EA Core 2.5

Continental Breakfast
Monday - Tuesday
7:00 - 8:00 AM
Wednesday
7:00 - 8:00 AM

Monday, Nov.. 2
8:00 - 10:15 AM
General Session
Session 2:
It's not Web 2.0.
It's not Web 3.0.
It's simply life.
Keynote Speaker:
Peter Shankman

Monday
Luncheon
12:05 - 2:00 PM
Relaxing/working lunch. No speaker/ presentation

Monday Evening
Gala Event
6:30 - 9:30 PM
Name Badges Required

Tuesday
3:00 - 6:00 PM
Small Firms Networking Forum

Monday, Nov. 2 10:35 -11:50 AM Track #1

Session 3
Retiree Medical -- Innovative Designs and "Cutting-Edge" Accounting
CE 1.5

Session 4
"Why Do I Have to Provide You with an Incentive to Take Drugs?"
CE 1.5

Session 5
What's Up In Washington?
CE/EA Noncore 1.5

Session 6
Wrap-up in Nori: Overview of Pensions in Japan
CE/EA Noncore 1.5

Session 7
No Country for Old Men (and Women) Mortality Trends & Longevity Hedges
CE 1.5/EA Core .75/EA Noncore .75

Session 8
Public Employee Retirement Plan GASB
CE/EA Noncore 1.5

Session 9
"Check Your WRERA View Mirror"
CE/EA Core 1.5

Session 10
It's a Small World After All
CE/EA Core 1.5

Monday, Nov. 2 2:15 - 3:30 PM

Session 11
IAS and FAS - How to Help Companies Make the Transition from US GAAP to IFRS
CE/EA Noncore 1.5

Session 12
Late Breaking Developments
CE/EA Core 1.5

Session 13
Serving the Interest of the Public
CE 1.5/EA Core .75/ EA Noncore .75

Session 14
If We Build It, Will They Come? A Retirement 20/20 Update
CE/EA Noncore 1.5

Session 15
Increasing Your Personal Actuarial Value
CE/EA Noncore 1.5

Session 16
A Case Study in Workforce Planning
CE/EA Noncore 1.5

Session 17
Retiree Medical: Still in the Trenches
CE/EA Noncore 1.5

Session 18
Consumer Driven Healthcare -- Emerging Data & Trends
CE 1.5

Monday, Nov. 2 3:50 - 5:05 PM Track #3

Session 19
Small Plan Design -- "Taking it to the Limit"
CE/EA Core 1.5

Session 20
New Buyer Perspective
CE 1.5

Session 21
GASB 43/45: Raiders of the Not-So-Lost ARC
CE/EA Noncore 1.5

Session 22
Healthcare Reform -- Budget Implications
CE 1.5

Session 23
I Have a Friend Who... An Ethics Workshop
CE/EA Core 1.5

Session 24
DC Plans -- Is That Your Final Answer?
CE/EA Noncore 1.5

Session 25
Are Your Smarter Than an Actuarial Student?
CE/EA Core 1.5

Session 26
Asset Liability Modeling Today - Liability Driven Investing Approaches
CE/EA Noncore 1.5

Tuesday, Nov. 3 8:00 - 9:40 AM Track #4

Session 27
"The Good, The Bad, and The Ugly" PPA-Unanswered Questions
CE/EA Core 2.0

Session 28
Workshop on Public Employee Retirement Systems (Part I)
CE 2.0/EA Core 1.0/EA Noncore 1.0

Session 29
EACAs, QACAs, and MRD Waivers
CE/EA Noncore 2.0

Session 30
When the CFO says: "*!?*!!?"
CE/EA Noncore 2.0

Session 31
Case Studies from Health Data Warehouse Users
CE 2.0

Session 32
Debate: A National Care Record Database, for or Against? CE 2.0

Session 33
X-Men and Other Super Heroes: Expatriate Benefits and Compensation
CE 2.0/EA Core .5/EA Noncore 1.5

Session 34
"Hang 'Em High" Executive Compensation Issues in Today's World
CE/EA Noncore 2.0

Tuesday, Nov. 3 10:00 - 11:40 AM Track #5

Session 35
Blazing Saddles: Underfunded Plans and the PBGC
CE/EA Core 2.0

Session 36
"Go To Health"
CE 2.0

Session 37
DC Rodeo - How to Get Employees in the Game and Help Them Stay on Top when the Riding Gets Rough

Session 38
Legislative and Regulatory Update
CE 2.0

Session 39
Return of the Workshop on Public Employee Retirement Systems (Part II)
CE 2.0/EA Core 1.0/EA Noncore 1.0

Session 40
Spanning the Globe "and Nobody Got Hurt"
CE/EA Noncore 2.0

Session 41
What's in it for Me? Communicating Complex Concepts
CE 2.0

Session 42
Tuesday Afternoon Session
12:15 - 2:20 PM
The ASB and You: Something Old, Something New, Something Borrowed, Something Blue

Wed., Nov. 4 8:00 - 9:15 AM Track #6

Session 43
Multi-employer Workshop
CE 1.5/EA Core .75/EA Noncore .75 EA

Session 44
Communicating Uncertainty
CE 1.5

Session 45
Dances with Wolves
CE/EA Core 1.5

Session 46
ERM - Actuaries and Credentials
CE 1.5

Session 47
Is Retiree Drug Subsidy (RDS) the Best Approach for Employers - or - RDS Alternatives? CE 1.5

Session 48
Physician Perspectives on Healthcare Direction
CE 1.5

Session 49
Stand By Your Plan
CE 1.5/EA Core .75/ EA Noncore .75

Wed., Nov. 4 9:30 - 10:45 AM

Session 50
Impact of the Economic Downturn on Employers' Health & Welfare Benefits
CE 1.5

Session 51
Medicare Futures
CE 1.5

Session 52
Life Insurance for Pension Actuaries
CE 1.5

Session 53
If I Could Do it All Over Again - Retirement Plan of the Future
CE/EA Noncore 1.5

Session 54
Convergence with IAS
CE/EA Noncore 1.5

Session 55
Dialogue with the IRS
CE/EA Core 1.5

Session 56
Seeing the Forest for the Trees: Bringing Value Back to the Actuary-Client Relationship
CE/EA Noncore 1.5

Wednesday, Nov. 4 11:00 AM - 1:00 PM

Session 57
CLOSING GENERAL SESSION
ABCD Hearing
CE/EA Core 2.0

SEMINARS
Available After the Annual Meeting

Expert Witness
Wednesday, Nov. 4
2:00 - 6:00 PM
Thursday, Nov. 5
8:00 AM - Noon
EA Noncore TBD

Retiree Medical Update
Wednesday, Nov. 4
2:00 - 6:00 PM
Thursday, Nov. 5
8:00 AM - Noon
EA Noncore

Conference / QS
(Conference/QS credit in all sessions)

EA Core

EA Noncore

Track Color Code Key
- Health
- Pension
- Cross Discipline
- Professionalism

2009 Conference Annual Meeting
November 1 - 4, 2009

JW Marriott Starr Pass Resort & Spa
Tucson, AZ

The Conference of Consulting Actuaries (CCA) is pleased to announce its 2009 Annual Meeting, Sunday, November 1 to Wednesday, November 4, at the JW Marriott Starr Pass Resort & Spa in Tucson, Arizona.

This registration brochure includes information on the educational sessions, meeting and hotel registrations, schedule of events and seminars following the meeting. Individual session information and social activities details are available on our website at: www.ccactuaries.org. The meeting registration and session preference form is included. Use it to (1) register for the meeting, (2) register accompanying persons for the accompanying persons program, (3) reserve space in sessions, (4) register guests for Monday's luncheon, and (5) register for seminars following the meeting. The Monday Evening Gala Event is included as part of meeting attendee and guest registrations. Travel arrangements and hotel reservations are to be made by the individual attendees. Hotel reservations confirmed with a deposit by October 8, 2009 qualify for the CCA meeting room rate. Reservations after this date are subject to availability and may not qualify for the CCA meeting's rate.

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

The JW Marriott Starr Pass Resort & Spa is a wonderful place for this unique educational experience. Mark your calendar and I'll see you in November!

Sincerely,

Adam J Reese

Adam J. Reese, Secretary

Sponsorship Opportunities Available

An exciting new and unique opportunity for your company!

Sponsor an event at our Annual Meeting
Visit our web site at:
ccactuaries.org
for complete details.

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Stephen N. Eisenstein, Vice Chair

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Robert O. Bacher
Barry S. Blecher
Erich Y. Blumberg
Steven D. Bryson
Douglas J. Carey
Laurel S. Cochennet
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Randolph B. Root
Patricia A. Rotello
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Ira M. Summer
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Thomas L. Totten
George B. Wagoner
Lance J. Weiss
Dale H. Yamamoto

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

JW MARRIOTT STARR PASS RESORT & SPA

Enjoy the mountains of Arizona at JW Marriott Starr Pass Resort & Spa. Located just west of an area considered the birthplace of Tucson, AZ, this resort hotel is rich with culture, history and beauty. Experience a truly unique destination resort complete with world class spa facilities and nationally acclaimed Arizona golf courses. Fine dining and award winning restaurants further complement this one of a kind Tucson resort hotel.

The CCA's group rate for the JW Marriott Starr Pass Resort & Spa is **$240 per night** for single or double occupancy, excluding tax. The JW Marriott Starr Pass Resort & Spa will honor our room block until **10-08-09**. After this date, rooms are sold based on availability and may not qualify for the Conference's group rate. **Should you encounter any challenges, please contact the CCA office immediately.** Please make your own reservations at the JW Marriott Starr Pass Resort & Spa by **calling: (888) 527-8989 and requesting a room in the Conference of Consulting Actuaries' room block, or you may register online at:**

http://marriott.com/tussp?groupCode=concona&app=resvlink

IMPORTANT INFORMATION ON OFFICIAL HOTEL SUPPORT

In order for the Conference of Consulting Actuaries to conduct high quality meetings at desirable sites for a reasonable registration fee, it is necessary for the CCA to reserve a block of hotel rooms for meeting attendees. In exchange for filling the required number of sleeping rooms, the CCA is allowed to use the hotel's meeting facilities, thus keeping registration fees down. In addition, meeting attendees are given a reduced rate for their sleeping rooms over leisure travelers.

We strongly urge all meeting attendees to take advantage of the group rate and stay at the official meeting hotel, the JW Marriott Starr Pass Resort & Spa.

We Suggest Early Registration – ***We encourage you to register early as sessions are filled on a first-come, first-served basis and often fill up. In the event of record number of registrations, the CCA reserves the right to limit the number of registrations it accepts.***

Meeting Registration

Complete the registration form to register for the meeting and to indicate your specific session preferences. Register online or mail the completed registration form with payment to the CCA. **Registrations are not processed without the appropriate payment. Online registration** with credit card payment (VISA and MasterCard only) is available via the CCA web site at **www.ccactuaries.org**.

Within four weeks of receiving your registration form and payment, the CCA issues confirmation that the CCA received your completed registration and payment. It also provides you an opportunity to verify the details of your registration.

We strongly recommend registering for the meeting in advance since space in the sessions is limited. The CCA would like to receive all registration forms **by 9/18/09** as sessions are reserved on a first come first served basis.

Cancellation Clause

In the occurrence of unforeseen events, the CCA reserves the right to cancel the meeting. Meeting fees charged by the CCA office will be refunded. However, the CCA will not be held liable for any airline, hotel, or other penalties that may be assessed to attendees as a result of this cancellation.

MEETING ATTENDEES

The registration fee for meeting attendees includes the following:

- Meeting Materials
- Monday Evening Gala Event
- Refreshment Breaks
- Monday Luncheon
- Continental Breakfasts Monday, Tuesday, Wednesday

Check to see who is already registered – see the online roster of attendees at:

http://www.ccactuaries.org/events/am2009/attendee-roster.pdf

	Registrations by 9/18	Postmarked 9/19 and later
CCA Member Meeting Fee	$1,150	$1,250
Non CCA Member Meeting Fee	$1,550*	$1,650*

** The CCA offers a special arrangement for any participant wishing to become a CCA member. Attendees who pay the nonmember fee, submit a completed CCA membership application by December 31, 2009, and are approved for membership receive a waiver of first-year membership dues (currently a savings of $390).*

Accompanying Persons

The registration fee for an accompanying person ($125 for persons age 18 and over, and $90 for persons age 3-17) includes the following:

- Continental Breakfasts (Monday, Tuesday, Wednesday)
- Monday Evening Gala Event

Accompanying persons can purchase tickets for the Monday luncheon at $60/ticket. Space is limited so register early.

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 overnight mail or faxed to the CCA office, according to the schedule below.**

Up to 9/18	9/19 - 10/2	10/3 and later
Full refund less $100 administration fee	50% of registration fee	NO REFUND
Accompanying Person Registration		
Full refund less 50%	NO REFUND	NO REFUND

In order to qualify, requests for refunds must be made in writing and postmarked, or faxed by the above specified dates.
Send to:

Conference of Consulting Actuaries
3880 Salem Lake Drive, Suite H
Long Grove, IL 60047-5292
Fax: 847/719-6506

Travel Information

The JW Marriott Starr Pass Resort & Spa is located approximately 13 miles NW of the Tucson International Airport.

The hotel does not provide shuttle service. Alternate transportation: Arizona Stagecoach. Estimated taxi fare: $35.00 USD (one way).

GENERAL INFORMATION

Concurrent Sessions

Please complete the concurrent session preference form on the reserve side of the registration 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.

EA Continuing Education Requirement

Enrolled Actuaries can earn up to **18** credit hours of continuing education credits at the CCA's 2009 Annual Meeting. Total credits include a possible **2.5** credits for attendance at the Tuesday afternoon session, and a Sunday session earning **2.5*** credits based on a session presented on the "Gray and Blue Book" at the 2009 Enrolled Actuaries Meeting. **Please note that the proposed credits listed for all sessions in this brochure are subject to the final approval by the Joint Board for the Enrollment of Actuaries.**

Conference's Required Continuing Education Program

CCA members attending the Annual Meeting have the opportunity to earn up to 18 of the 30 required credits toward the 2009 continuing education requirement (including three professionalism credits – every session qualifies for credit). We believe all sessions are applicable for credit under the Qualification Standards. For more information about the program, please consult the CCA web site at:

http://www.ccactuaries.org/about/ce-requirement.html

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 Conference's Policy

The Board of Directors of the Conference of Consulting Actuaries intends adherence to the antitrust laws. The Conference 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.

SEMINARS AVAILABLE AFTER THE MEETING

- **Expert Witness**
- **Retiree Medical Update**

Wednesday, Nov. 4 **2:00 - 6:00 PM**	**Thursday, Nov. 5** **8:00 AM - Noon**

To register for either seminar, complete the registration form in this brochure or register online to reserve your space and make the appropriate additional payment. Registrations are not processed without appropriate payment. For complete information on seminars visit our web site: www.ccactuaries.org

SPECIAL ACTIVITIES & NETWORKING EVENTS

Monday General Session: 8:00 - 10:15 AM

It's not Web 2.0. It's not Web 3.0. It's simply life.

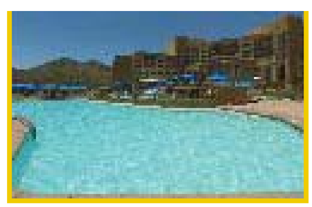
Guest Speaker: Peter Shankman

An entrepreneur, author, speaker, and worldwide connector, Peter is recognized for radically new ways of thinking about Social Media, PR, marketing, advertising, creativity, and customer service.

Peter is the author of *Can We Do That?! Outrageous PR Stunts That Work and Why Your Company Needs Them* (Wiley and Sons 2006) and a frequent keynote speaker and workshop presenter at conferences and trade shows worldwide, including The Public Relations Society of America, The International Association of Business Communicators, CTIA, CTAM, CES, PMA, OMMA, Mobile Marketing Asia, and the Direct Marketing Association.

A marketing pundit for several national and international news channels, including Fox News, CNN, and MSNBC, Peter is frequently quoted in major media and trade publications, including The Wall Street Journal, Los Angeles Times, New York Daily News, Associated Press, Reuters, CNN, and USA Today.

Monday Evening Gala Event
6:30 - 9:30 PM



This year the Monday Evening Gala Event takes place on-site at the JW Marriott Starr Pass Resort. Meeting attendees and their registered guests are treated to an informal and relaxed event. Meander around the beautiful pool grounds, dance or just sit back, relax and listen to music while enjoying local cuisine.

This is a great opportunity to relax away from the meeting and spend social time with your peers in a beautiful setting. It is an evening to remember!

Small Firms Networking Forum

Tuesday Afternoon –3:00 - 6:00 PM

Anyone interested is invited to stop by, meet, and discuss small firm issues, news, and outlooks.

Tuesday Evening – Poker Night

8:30 PM - Midnight

A networking event!

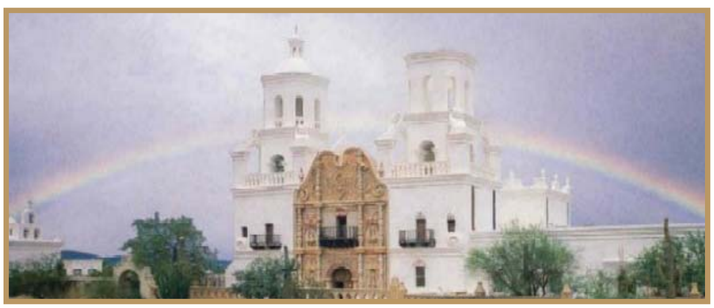
TOUR INFORMATION

The following tours were exclusively designed for the attendees of the CCA's Annual Meeting.

SUNDAY, NOVEMBER 1, 2009
PIMA AIR & SPACE MUSEUM
1:00pm – 5:00pm $65.00/pp

Explore aviation history at Pima Air & Space Museum, home of the largest privately owned collection of historical aircraft in the country. From a full-scale model of the Wright Bros.' 1903 Wright Flyer, to a mock-up of the world's fastest aircraft, the X-15, this museum is sure to interest everyone. More than 200 military and civilian aircraft are here on display, along with engines, flight simulators, uniforms and other aviation memorabilia. You can step right into the restored Douglas DC-6, used by both Presidents Kennedy and Johnson during their terms of office. Some of the aircraft at the Pima Air Museum are on loan from the Smithsonian, the Air Force Museum and Navy. All of them are significant from both an engineering and historical perspective.
**This is an outdoor activity that requires walking, so comfortable shoes and sunscreen are encouraged.*

Minimum guarantee of 8pp required



MONDAY, NOVEMBER 2, 2009
SAN XAVIER MISSION & TUBAC
9:00am – 1:00pm $58.00/pp

The fabled "White Dove of the Desert", San Xavier Mission, was founded by Father Kino, a Jesuit missionary, in the early 1700's. Regarded as the best example of Spanish Moorish architecture in the United States, San Xavier was completed by local Indians under the direction of Franciscan friars. Standing stark white on the desert landscape, the Mission still serves as an active spiritual center and resides on the Tohono O'odham Indian reservation.
According to archaeologists and anthropologists, peoples of many cultures have dwelled along the Santa Cruz River for perhaps 10,000 years. The Hohokam Indians were here between 300 and 400 A.D. The Pima and Papago Indians arrived in the 1500's. The Spaniards later arrived with Father Kino in 1761, and in 1821 Mexico gained their independence. It wasn't until 1853 that Tubac became part of the United States - thanks to the Gadsden Purchase. This village is rich in art and history, and with over 80 unique businesses and working studios, Tubac offers a wide variety of shopping possibilities. From sterling silver, western apparel, gourmet gifts, Native American jewelry and crafts, to original fine art and prints by popular southwestern artists, these nationally known shops will delight your guests.
**This is an outdoor activity that requires walking, so comfortable shoes and sunscreen are encouraged.*

Minimum guarantee of 8pp required

TUESDAY, NOVEMBER 3, 2009
KARTCHNER CAVERNS
1:00pm – 5:00pm $86.50/pp
Your travel begins as you drive through Southeastern Arizona to Benson, approximately 1 hour from the JW Marriott Starr Pass. Your naturalist/guide will share the history and the founding of Kartchner Caverns. An incredible limestone cave in southeastern Arizona, Kartchner Caverns State Park boasts many world-class features that have been protected since the cave was discovered in 1974. The caverns were formed approximately 500,000 years ago. Before your underground tour, you will visit the 23,000 square-foot Discovery Center, which centers on world-class exhibits, a large gift shop, regional displays and educational information about the caverns and surrounding landscape. The cavern has been surveyed at 2.4 miles long. Kartchner Caverns is a wet, "live" cave, where water percolates from the surface and calcium carbonate features continue to grow in the darkness.
**This is an outdoor activity that requires walking, so comfortable shoes and sunscreen are encouraged.*

Minimum guarantee of 8pp required
This tour will have limited availability. Tour times TBD.

			Qty.	Subtotal
Sunday, November 1, 2009				
Time: 1:00pm- Return 5:00pm				
Pima Air & Space Museum	$65.00/pp	x	________	= $________
Monday, November 2, 2009				
Time: 9:00am- Return 1:00pm				
San Xavier Mission & Tubac	$58.00/pp	x	________	= $________
Tuesday, November 3, 2009				
Time: 1:00pm- Return 5:00pm				
Kartchner Caverns	$86.50/pp	x	________	= $________
				TOTAL = $__________

NAME________________________________PHONE______________
(PLEASE PRINT)
ADDRESS______________________________FAX________________

CITY, STATE, ZIP____

CREDIT CARD #______________________EXP. DATE___________
(Visa MasterCard AX)

SIGNATURE____

Please e-mail Carey.Higgins@marriott.com or fax to 520-791-6184

All prices include gratuities and 8.1% sales tax.

All tours provided by Starr Destinations include round trip transportation; naturalist guide; admissions where application; and bottled water on board. Reservations must be confirmed by 5:00 pm Friday, October 30, 2009.

Payment must be made by credit card. Cancellations made after the 5:00 pm deadline or no shows will be charged the full tour amount.

There is a minimum number of participants that must be reached or the tour will be cancelled. There will be no penalty should this occur.

PROGRAM SUMMARY

Sunday, November 1

2:00 PM - 8:00 PM	Registration
5:00 PM - 7:05 PM	Gray Book Review – Session 1

Monday, November 2

7:00 AM - 12:05 PM	Registration
7:00 AM - 8:00 AM	Continental Breakfast
8:00 AM - 10:15 AM	General Session – Session 2 It's not Web 2.0. It's not Web 3.0. It's simply life. Keynote Speaker: ***Peter Shankman***
10:15 AM - 10:35 AM	Refreshment Break
10:35 AM - 11:50 AM	Concurrent Sessions 3 – 10
12:05 PM - 2:00 PM	Luncheon – Relaxing/working luncheon without presentations/speakers. Lunch provided to registered attendees.
2:00 PM - 5:15 PM	Registration
2:15 PM - 3:30 PM	Concurrent Sessions 11 – 18
3:30 PM - 3:50 PM	Refreshment Break
3:50 PM - 5:05 PM	Concurrent Sessions 19 – 26
6:30 PM - 9:30 PM	**Monday Evening Gala Event**

Tuesday, November 3

7:00 AM - 12:05 PM	Registration
7:00 AM - 8:00 AM	Continental Breakfast
8:00 AM - 9:40 AM	Concurrent Sessions 27 – 34
9:40 AM - 10:00 AM	Refreshment Break
10:00 AM - 11:40 AM	Concurrent Sessions 35 – 41
12:15 PM - 2:20 PM	Special Afternoon Professionalism Session 42 - The ASB and You: Something Old, Something New, Something Borrowed, Something Blue
3:00 PM - 6:00 PM	**Small Firms Networking Forum**
8:30 PM - Midnight	**Poker Night**

Wednesday, November 4

7:00 AM - Noon	Registration
7:00 AM - 8:00 AM	Continental Breakfast
8:00 AM - 9:15 AM	Concurrent Sessions 43 – 49
9:15 AM - 9:30 AM	Refreshment Break
9:30 AM - 10:45 AM	Concurrent Sessions 50 – 56
10:45 AM - 11:00 AM	Refreshment Break
11:00 AM - 1:00 PM	Closing General Session 57 - ABCD Hearing

SUNDAY, NOVEMBER 1

5:00 – 7:05 PM
Sunday Session

1 Gray Book Review
CE/EA Core: 2.5

Experienced practitioners lead a review of government responses to the Gray Books. The panelists discuss the practical implications of the answers and any new information developed since the 2009 EA Meeting.

Panel: 1. William E. Roberts, 2. Bruce Cadenhead, 3. David A. Coronel

MONDAY, NOVEMBER 2

Continental Breakfast
7:00 – 8:00 AM

8:00 – 10:15 AM

Opening Remarks: Phillip A. Merdinger
Annual Meeting Chair

2 GS - 02 – General Session: It's not Web 2.0. It's not Web 3.0. It's simply life.
CE: 1.5

Keynote Speaker: Peter Shankman

We have more technology than ever before. We can reach more people than ever before, in shorter amounts of time. But that doesn't mean we should do it! You can have all the tools in the world—it doesn't mean you know what to do with them!

When Help a Reporter launched in March 2008, it quickly became one of the most successful word of mouth programs ever, attracting more than 75,000 current members without spending one penny on advertising. How?

The beauty of social and viral technology is that it allows us to reach many, many people in nanoseconds. The danger of it? The exact same thing.

Peter Shankman discusses social networking, viral marketing and all the "fun ways" to use them—and perhaps most important why sometimes not using any of them is your best bet. He'll show you how marketers, businesses, publicists, and everyday humans are:
• Using social media (or a facet thereof) to spearhead new marketing campaigns and initiatives;
• Realizing that just because it exists, doesn't mean you have to use it;
• Getting smarter about social networking every day; and
• Learning that it's not about making something "viral," but about making something "good."

Panel: 1. Lance J. Weiss, 2. Peter Shankman

Refreshment Break
10:15 – 10:35 AM

Sessions – Track #1
10:35 – 11:50 AM

3 Retiree Medical -- Innovative Designs and "Cutting-Edge" Accounting
CE: 1.5

Employers are now looking at some retiree medical designs that likely were never envisioned when FAS 106 was put into place. Come learn about some of these designs and how to account for them.

Panel: 1. Stuart H. Alden. 2. TBA

4 "Why Do I Have to Provide You with an Incentive to Take Drugs?"
CE: 1.5

Speakers at this session explore cost effectiveness of incentive based prescription drug plan designs. Are they working? Do they reduce costs?

Panel: 1. Thomas S. Tomczyk, 2. TBA

5 What's Up In Washington?
CE/EA Noncore: 1.5

New Administration, new Congress, new thoughts? Where is the country headed in relation to retirement plans?

Panel: 1. Thomas L. Totten, 2. J. Michael Keeling, 3. Karen Levin

6 Wrap-up in Nori: Overview of Pensions in Japan
CE/EA Noncore: 1.5

Japan's cultural and language barriers have made understanding its pension environment difficult for US multinationals. But those communication barriers will be lifted at this session. With an approaching deadline (March, 2012) by which to restructure tax qualified pension plans (TQPPs) and a gradual movement toward hybrid contribution plans underway, a look at Japan's benefits scene is interesting and timely.

Panel: 1. Barry S. Blecher, 2. Mitsuyasu Nishiwaki

7 No Country for Old Men (and Women): Mortality Trends & Longevity Hedges
CE 1.5/EA Core: 0.75/EA Noncore: 0.75

Are actuaries adequately planning for the "living to 100 generation?" How can we assist clients to hedge longevity risk? The speakers explore and contrast US mortality trends and longevity hedging techniques being considered in the UK.

Panel: 1. Kenneth F. Hohman, 2. Keith Barton, 3. David Sandberg

8 Public Employee Retirement Plan GASB
CE/EA Noncore: 1.5

The Government Accounting Standards Board (GASB) is in the process of rethinking the principals behind reporting and disclosure for public employee retirement plans. The speakers discuss the process GASB is going through, what they have produced so far and where this may be headed.

Panel: 1. Ira M. Summer, 2. TBA

9 "Check Your WRERA View Mirror"
CE/EA Core: 1.5

WRERA relief update – a general discussion of where we are to date on regulations and how actuaries have been managing the application of the rules in the current environment.

Panel: 1. Alice C. Hicks, 2. Maria M. Sarli, 3. Howard A. Freidin, 4. Eric A. Keener

10 It's a Small World After All
CE/EA Core: 1.5

It's a world of hope and a world of new legislation, regulatory guidance, and financial turmoil. Come hear what's new in small plan valuations and administration.

Panel: 1. Scott A. Hittner, 2. TBA

LUNCHEON
12:05 – 2:00 PM

Relaxing/working luncheon, without presentations/speakers. Lunch provided to registered attendees.

Sessions – Track #2
2:15 – 3:30 PM

11 IAS and FAS - How to Help Companies Make the Transition from US GAAP to IFRS
CE/EA Noncore: 1.5

The SEC has issued a proposed road map for US public companies to adopt International Financial Reporting Standards. The presenters at this session attempt to help you understand where US GAAP is headed and what it means for accounting for employee benefits.

Panel: 1. Joseph P. Strazemski, 2. Richard G. Lemieux, 3. Diana Scott, Coordinator: Casey Shork

12 Late Breaking Developments
CE/EA Core: 1.5

A panel of diversified professionals discuss the latest developments affecting retirement plans on the legislative, regulatory and legal fronts. Among the topics that may be covered are: PPA, 2009 legislation, guidance from the IRS, DOL, Treasury and recent court decisions.

Panel: 1. Donald J. Segal, 2. Ethan E. Kra

13 Serving the Interest of the Public
CE 1.5/EA Core: 0.75/EA Noncore: 0.75

In 2007, the leaders of the North American Actuarial Council (NAAC) signed a statement acknowledging "the paramount importance of acting in the public interest" and indicating that it "is important to identify, protect, and advance the public interest in the work of our profession—its organizations and its members."

What does this mean for an individual actuary? Who is the "public?" Is there one "public" or do different segments of the "public" have different interests? Is this a call for each actuary to serve the interests of the "public" or a call to the profession as a whole?

Actuaries in the UK are currently dealing with implementing a similar call to serve the public interest with regard to setting standards of practice on ethical issues. Panelists from the UK and the US, including a member of the Actuarial Standards Board, lead a discussion on how these calls may change how we provide actuarial services.

Panel: 1. Douglas J. Carey, 2. Lawrence J. Sher, 3. Nicholas Salter

14 If We Build It, Will They Come? A Retirement 20/20 Update
CE/EA Noncore: 1.5

The Society of Actuaries Pension Section launched the Retirement 20/20 project in late 2005 in reaction to the shortcomings of both traditional defined benefit (DB) plans and defined contribution (DC) plans, shortcomings which have been further accentuated during the recent financial crisis. Retirement 20/20 is a strategic multi-year project to look at the possibilities that could exist outside of the traditional DB/DC framework in both the U.S and Canada. Since its inception, Retirement 20/20 has systematically brought together actuaries (pensions and annuities), economists, attorneys, employers, investment advisors and public policy experts to debate what we need for a robust retirement system in the 21st century without regard to the constraints of existing legislative requirements.

The speakers at this session bring you up to date on what has been learned in our three conferences, present the measurement framework tool and demonstrate its application to several actual design models, summarize the Retirement 20/20 capstone report presented at the Pension Research Council Conference at Wharton earlier this year, and give you a preview of our plans for 2010, including our unique and exciting "Call for Models Contest."

Panel: 1. Scott A. Hittner, 2. R. Evan Inglis, 3. Andrew J. Peterson

15 Increasing Your Personal Actuarial Value
CE/EA Noncore: 1.5

More then ever before we are all challenged to convince clients and employers that we bring value to the table. The speakers explore how each of us can do this, whether it be by incorporating ERM, broadening our skills, publishing, etc.

Panel: 1. Phillip A. Merdinger. 2. TBA

16 A Case Study in Workforce Planning
CE/EA Noncore: 1.5

In a hypothetical scenario, a large employer with an aging workforce embarked on a workforce planning exercise. Some retirement-related issues were encountered, including the affects of wear away. These and other issues/affects are examined.

Panel: 1. Linda A. Konarik, 2. Rachel Everaard

17 Retiree Medical: Still In the Trenches
CE/EA Noncore: 1.5

This is an open-forum discussion about actuarial OPEB issues, both private and public sector moderated by leading consultants. Come discuss your hot topics.

Panel: 1. Steven D. Bryson, 2. John E. Bartel, 3. Noel J. Thomas

18 Consumer Driven Healthcare -- Emerging Data & Trends
CE: 1.5

This session starts with a review of the key findings from the American Academy of Actuaries' paper on CDH Emerging Data. With this as a basis, we will move on to discuss CDH analyses that emerged too late to be considered by the AAA CDH committee and other practical observations of how CDH is faring in light of the economy and the prospects for health care reform.

Panel: 1. Lawrence J. McCarthy, 2. Ronald G. Barlow,
Coordinator: Michelle L. Raleigh

Refreshment Break
3:30 – 3:50 PM

Sessions – Track #3
3:50 – 5:05 PM

19 Small Plan Design -- "Taking it to the Limit"
CE/EA Core: 1.5

What's new in designing retirement plans in the small plan market? Bring your ideas and be ready to share.

Panel: 1. Raymond J. Lee, 2. J. Gregory Gaston

20 New Buyer Perspective
CE: 1.5

With companies focused on belt tightening and the bottom line, consulting services may be viewed as expensive, or worse, expendable. How can we effectively market our services in a distressed environment? A professional services advisor and corporate procurement officer discuss best practices and broader new buyer perspectives.

Panel: 1. Phillip A. Merdinger, 2. Irie Turner

21 GASB 43/45: Raiders of the Not-So-Lost ARC
CE/EA Noncore: 1.5

How are public OPEB sponsors dealing with these very large liabilities? Hear from both sides of the table. A finance director and a consultant discuss strategies, successes and failures.

Panel: 1. Steven D. Bryson, 2. Ferdinand Gaenzel, 3. Brian J. Fuller,
4. Bonnie Albritton, 5. Tom Duensing

22 Healthcare Reform – Budget Implications
CE: 1.5

The new Administration has promised healthcare reform before the end of the President's first term. Dramatic progress has been made to date. The panel discusses short-term and longer-term implications of proposed initiatives on the US budget and its impact on individuals.

Panel: 1. Dale H. Yamamoto, 2. TBA

MONDAY, NOVEMBER 2

23 I Have a Friend Who… An Ethics Workshop
CE/EA Core: 1.5

Bring your burning ethics questions to this interactive workshop. Current and former ABCD members lead discussions of attendees' issues. (This is a workshop limited to 40 attendees.)

Panel: 1. William J. Falk, 2. Robert J. Rietz, 3. Carol Ruth Sears

24 DC Plans -- Is That Your Final Answer?
CE/EA Noncore: 1.5

How were 401(k) plan participants impacted by the financial crisis? Are 401(k) plans a failure? The panelists focus on DC plan risks, retirement income adequacy, and how plan sponsors are working to manage those risks and improve the outcomes.

Panel: 1. Robert J. Reiskytl, 2. TBA

25 Are You Smarter Than an Actuarial Student?
CE/EA Core: 1.5

How many years has it been since you sat for an actuarial exam? Do you still think you have your edge? Join us for the latest actuarial game show where contestants are asked to test their knowledge, with help from recent Enrolled Actuary exam passers. The emphasis is on material a pension consulting actuary should know. Don't be in jeopardy of not knowing what you should.

Panel: 1. Patricia A. Rotello, 2. Donald J. Segal, 3. Alice C. Hicks

26 Asset Liability Modeling Today - Liability Driven Investing Approaches
CE/EA Noncore: 1.5

Investments - LDI 101, LDI -- what happened in 2008/2009? What alternative investments are suggested for the future?

Panel: 1. Randolph B. Root, 2. Travis J. Winkels, 3. F. Gary Knapp

MONDAY EVENING GALA EVENT

6:30 – 9:30 PM

This year the Monday Evening Gala Event takes place on-site at the JW Marriott Starr Pass Resort & Spa. Meeting attendees and their registered guest are treated to an informal and relaxed event. Meander around the beautiful pool grounds, dance, or just sit back, relax and listen to music while enjoying the local cuisine.

This is a great opportunity to relax away from the meeting and spend social time with your peers. It is an evening to remember!

Name Badges Required for Admittance

TUESDAY, NOVEMBER 3

Continental Breakfast
7:00 – 8:00 AM

Sessions – Track #4
8:00 – 9:40 AM

27 "The Good, The Bad, and The Ugly" PPA-Unanswered Questions
CE/ EA Core: 2.0

There are still a number of issues under PPA where final guidance has not been issued. The panel identifies and discusses the top outstanding issues.

Panel: 1. Alice C. Hicks, 2. Douglas K. German, 3. Heidi Rackley, 4. Rob Austin

28 Workshop on Public Employee Retirement Systems (Part I)
CE 2.0/EA Core: 1.0/EA Noncore: 1.0

Come join an open forum to exchange ideas, information and experiences on current topics of interest to actuaries who work with public employee retirement systems. Topics for discussion may include actuarial assumptions, plan design trends and more.

Panel: 1. Ira M. Summer, 2. TBA

29 EACAs, QACAs, and MRD Waivers
CE/EA Noncore: 2.0

Eligible Automatic Contribution Arrangement (EACA), Qualified Automatic Contribution Arrangement (QACA), Minimum Required Distribution (MRD). How has the financial crisis affected defined contribution plans? The speakers discuss short-term concerns and opportunities and expected long-term trends, including steps employers can take now to allow participants to recover from the economic downturn.

Panel: 1. William E. Roberts, 2. Amy L. Alexander, 3. Flora Olsen

30 When the CFO says: "*!?*!!?"
CE/EA Noncore: 2.0

First, the CFO tells all departments, "cut everything by 10%"… then you enter into talks about pension funding!! When he awakens from the coma, he says, "I need a business advisor, not an actuary!!" What DOES he want and why??

Panel: 1. Larry Lee Helmke, 2. Lewis Walker, 3. Richard French

31 Case Studies from Health Data Warehouse Users
CE: 2.0

Representatives from two analytic firms present new technology that's available today to help plans, employers and employees manage healthcare.

Panel: 1. Erich Y. Blumberg, 2. TBA

32 Debate: A National Care Record Database, for or Against?
CE: 2.0

Experts say $X billion is wasted each year due to incomplete, inaccurate, and/or redundant healthcare records. At the same time, real questions of privacy and flexibility have arisen. Come listen to all sides of the argument and form your own opinions.

Panel: 1. Stuart H. Alden, 2. TBA

33 X-Men and Other Super Heroes: Expatriate Benefits and Compensation
CE 2.0/EA Core: 0.5/EA Noncore: 1.5

A fascinating in-depth presentation on benefits and compensation for expatriates. Speakers at this session cover the legal and business issues involved in providing benefits to US citizens working overseas, particularly the interplay of US federal law (ERISA, HIPAA, COBRA), US state insurance laws, foreign/local legislation and inter-county tax treaties. Additional discussions include the provision of overall compensation packages to expatriates globally, and the various cost savings opportunities that are currently available to the employer.

Panel: 1. Barry S. Blecher, 2. Edward P. Hannibal, 3. Brian Iaia

34 "Hang 'Em High" Executive Compensation Issues in Today's World
CE/EA Noncore: 2.0

Risk management in executive compensation arrangements. No execs were harmed in the making of this session. Hear what is new and what exactly is happening after the events of the past year.

Panel: 1. Randolph B. Root, 2. Max Schwartz, 3. Andrew Mandel, 4. Steve Zwider

Refreshment Break
9:40 – 10:00 AM

Sessions – Track #5
10:00 – 11:40 AM

35 Blazing Saddles: Underfunded Plans and the PBGC
CE/EA Core: 2.0

The economic downturn has raised everyone's awareness of pension plan funding levels, including the PBGC. Hear from the speakers about how to deal with a broad range of PBGC issues including reportable event traps, annual employer financial and actuarial information reporting and PBGC's enhanced ability to pursue "downsizing liability."

Panel: 1. Patricia A. Rotello, 2. Harold J. Ashner, 3. Ajit Gadre, 4. Kristina Archeval

36 "Go To Health"
CE: 2.0

Discussion of integrated healthcare cost and quality management programs combining traditional and leading-edge approaches. Two employers discuss the approaches they have used, including traditional disease management and health promotion/disease prevention programs as well as leading-edge evidence-based medicine, medical home, on-site clinics and medical travel. Panelists at this session discuss effectiveness of approaches and lessons learned from both approaches which are successful and those that were not.

Panel: 1. George B. Wagoner, 2. Bruce Hochstadt, Coordinator: Michelle L. Raleigh

37 DC Rodeo - How to Get Employees in the Game and Help Them Stay on Top when the Riding gets Rough
CE/EA Noncore: 2.0

Our panel discusses behavioral finance in DC plans and some of the latest research on the influence of ethnicity on retirement plan behavior.

Panel: 1. Robert J. Reiskytl, 2. TBA

38 Legislative and Regulatory Update
CE: 2.0

The speakers provide an up-to-date overview of the status of healthcare reform (HCR) and other new and potential legislative/regulatory that is happening in the healthcare arena.

Panel: 1. Justin N. Hornburg, 2. Dale H. Yamamoto, 3. Chip Kerby

39 Return of the Workshop on Public Employee Retirement Systems (Part II)
CE 2.0/EA Core: 1.0/EA Noncore: 1.0

Continuing discussions of topics that were not covered in the previous session on public employee retirement systems. Topics may include assumption setting, reporting and disclosure, valuation and funding of DROP and OPEB.

Panel: 1. Ira M. Summer, 2. TBA

40 Spanning the Globe "and Nobody Got Hurt"
CE/EA Noncore: 2.0

How has the global financial crisis impacted retirement plans around the world? Do some countries have better mechanisms in place to avoid or manage large losses? The speakers at this session delve into and explore these issues.

Panel: 1. Douglas J. Carey, 2. Nicholas Salter, 3. William C. Walter, 4. William A. Branch

TUESDAY, NOVEMBER 3

41 What's in it for Me? Communicating Complex Concepts
CE: 2.0

As actuaries, we pride ourselves on communicating complex information to our clients. But are we providing the information they really need? Join us for a working session focused on moving from actuarial results to true awareness advice.

Panel: 1. Alice Pegel Stuart, 2. Stephen Parahus, 3. Sarah W. Wright

TUESDAY AFTERNOON PROFESSIONALISM SESSION

TUESDAY AFTERNOON PROFESSIONALISM SESSION
12:15 – 2:20 PM

42 The ASB and You: Something Old, Something New, Something Borrowed, Something Blue
CE/ EA Core: 2.5

What do we need to know about the new ASOPs? What have we forgotten about the old ASOPs? What is the process to identify new ASOPs or ASOPs for updating? Representatives of the ASB discuss recent and proposed ASOPs affecting consulting actuaries, especially ASOP 41. Other topics include how ASOPs implement the Council of US Presidents' (CUSP) statement regarding actuaries and the public interest.

Panel: 1. Lawrence J. Sher, 2. TBA

SMALL FIRMS NETWORKING FORUM
Tuesday Afternoon –3:00 - 6:00 PM

Anyone interested is invited to stop by, meet, and discuss small firm issues, news, and outlooks.

TUESDAY EVENING – POKER NIGHT
8:30 PM - Midnight

A networking event!

WEDNESDAY, NOVEMBER 4

Continental Breakfast
7: 00 – 8:00 AM

Sessions – Track #6
8:00 – 9:15AM

43 Multi-employer Workshop
CE 1.5/EA Core: 0.75/EA Noncore: 0.75

Discussion of issues impacting consulting to the multi-employer world. WARNING -- discussion may include health & welfare funding issues.

Panel: 1. Raymond J. Lee, 2. Jay K. Egelberg

44 Communicating Uncertainty
CE: 1.5

How to go beyond just delivering "the number(s)" whether they be next year's host country (H.C.) budget, program risk management (PRM)/RAB & expenses, pension liabilities/exp., etc. Incorporates the EA/consulting actuary conflict and ERM issues.

Panel: 1. Thomas S. Terry, 2. TBA

45 Dances with Wolves
CE/EA Core: 1.5

The devil is in the details -- what's involved in making sure that a plan's administration is compliant with all of the various notices and limitations.

Panel: 1. Joseph P. Strazemski, 2. Barbara Haws Demi,
3. Christine J. Drager, 4. Scott M. Japko,
Coordinator: Edward A. Quinn

46 ERM - Actuaries and Credentials
CE: 1.5

The role of actuaries in enterprise risk management is evolving around the world. The SOA has created the CERA designation and a global actuarial credential is being pursued. The speakers discuss what is being taught to ERM actuaries and what credentials are important and why.

Panel: 1. Kenneth F. Hohman, 2. Daniel P. Cassidy,
3. S. Michael McLaughlin

47 Is Retiree Drug Subsidy (RDS) the Best Approach for Employers - or - RDS Alternatives?
CE: 1.5

Historically, the primary value of employer sponsored retiree health plans for Medicare eligibles resided in the prescription drug benefit. However, the retiree health care environment changed considerably with the launch of Medicare Part D in 2006. Many employers elected to remain the primary payer of prescription drug benefits for their Medicare eligible retirees and to apply for federal subsidies under the Retiree Drug Subsidy (RDS) program. Now in the fourth RDS year and in challenging economic times, many employers are revisiting their decision to elect RDS and examining ever evolving options to sponsorship and delivery of health benefits for Medicare eligibles, particularly benefits where the employer subsidy is capped. The speakers during this session review employer alternatives to RDS from the consulting and Prescription Benefit Management points of view. In doing so, we may identify what actions employers are taking and the drivers behind that decision.

Panel: 1. Trevis G. Parson, 2. Britton Pim, 3. Edward M. Pudlowski

48 Physician Perspectives on Healthcare Direction
CE: 1.5

A panel of two physicians, with an actuary as moderator discuss how physicians view health information technology (HIT) initiatives, Consumer Driven Health Plans (CDHP), Disease Management and Wellness.

Panel: 1. Thomas S. Tomczyk, 2. TBA

49 Stand By Your Plan
CE 1.5/EA Core: 0.75/EA Noncore: 0.75

Panelists discuss overall low risk approaches to pension plans, plan design, and investments.

Panel: 1. Ellen L. Kleinstuber, 2. R. Evan Inglis, 3. Robert O. Bacher

Refreshment Break
9:15 – 9:30 AM

Sessions Track #7
9:30 – 10:45 AM

50 Impact of the Economic Downturn on Employers' Health & Welfare Benefits
CE: 1.5

What impact does/will this unprecedented economy and attempts to control it have on employers' health and welfare budgets? Specific potential topics include:
• Economic uncertainty and healthcare utilization/disability experience.
• COBRA subsidies - blessing or curse?
• Long-term impact of HIT.
• Long-term disability experience.

Panel: 1. Erich Y. Blumberg, 2. TBA

51 Medicare Futures
CE: 1.5

Changes to Medicare are in continual debate in Congress and in policy circles, ranging from the role of private plans to overall provider payment policy. More broadly, elements of Medicare could influence the development of a public plan option under national healthcare reform. Major healthcare changes are on the horizon for 2010 and later, and Medicare is clearly a central part of these evolving changes. Tune into the speakers at this session to get a current reading on how future changes in Medicare might impact insurers, employers and other parties involved in the management of post-65 benefits in particular, as well as Medicare's potential role in national healthcare reform.

Panel: 1. Trevis G. Parson, 2. Mark F. Olson, 3. Barry Carleton

52 Life Insurance for Pension Actuaries
CE: 1.5

The product development engine in the life insurance industry is running as strong as ever. The panelists describe some of the more creative products relevant to employers and the actuaries who consult to them.

Panel: 1. Dale H. Yamamoto, 2. TBA

53 If I Could Do it All Over Again - Retirement Plan of the Future
CE/EA Noncore: 1.5

Based on what we know today, how would you change pensions (outside of stringing up FASB?) Design, funding, investments, the whole ball of wax. In this interactive session, speakers provide their thoughts, along with audience critique of designs.

Panel: 1. Thomas L. Totten, 2. John Landis Dowell

WEDNESDAY, NOVEMBER 4

54 Convergence with IAS
CE/EA Noncore: 1.5

Have your clients asked how convergence to international accounting standards might impact them? If so, come to this session to learn about the important nuances and potential pitfalls of IFRS. Bring your questions too!

Panel: 1. John T. Stokesbury, 2. Keith Barton, 3. Marcus H. Rafiee, 4. Gregory M. Heise, Coordinator: Kenneth MacDonald

55 Dialogue with the IRS
CE/EA Core: 1.5

This is an excellent opportunity for attendees to ask questions and discuss important developments with representatives of the IRS. Don't miss your chance to (possibly) get answers to some questions that have been troubling you.

Panel: 1. Donald J. Segal, 2. IRS(s)

56 Seeing the Forest for the Trees: Bringing Value Back to the Actuary-Client Relationship
CE/EA Noncore: 1.5

The credit crisis, recession, and other economic impacts put pressure on the further commoditizing actuarial services. The volatility of PPA funding rules pushes us to become short-term managers of risk at the expense of a longer-term view. Senior actuaries will lead an interactive session on how we can be more relevant and add value to our client relationships.

Panel: 1. Stephen N. Eisenstein, 2. Thomas S. Terry, 3. Paul B. Zeisler, 4. Richard E. Jones

Refreshment Break
10:45 – 11:00 AM

Closing General Session
11:00 AM – 1:00 PM

57 ABCD Hearing
CE/EA Core: 2.0

Attend an ABCD hearing and listen in on the subsequent deliberations. Current and former ABCD members portray the subject actuary, the Investigator, and the ABCD chair(s) in a live hearing. Selected audience members serve as ABCD members.

Panel: 1. William J. Falk, 2. Robert J. Rietz, 3. Carol Ruth Sears

CE OPPORTUNITIES

AUDIOCAST SEMINAR SCHEDULE

Generally scheduled on the second Wednesday of the month from 12:30 – 1:45 ET

Date	Topic
July 8	ABCD and the Disciplinary Process
July 14	IFRS What's Coming? Future of Corporate Accounting for Benefits
September 9	Yield Curve 101
September 16	State of Healthcare Reform
October 7	Preparing for Pension/OPEB Year End Disclosures --Why Do Auditors Ask for That?
November 11	Code of Conduct - Does the Code Apply to This?
December 9	Qualification Standards

To register go to www.ccactuaries.org for more information

FUTURE CCA ANNUAL MEETINGS

October 24 - 27, 2010
TBA

October 23 - 26, 2011
TBA

October 21 - 24, 2012
TBA

FUTURE ENROLLED ACTUARIES MEETINGS

April 11 - 14, 2010
Marriott Wardman Park Hotel
Washington, DC

March 27 - 30, 2011
Marriott Wardman Park Hotel
Washington, DC

Conference Annual Meeting
November 1 - 4, 2009
JW Marriott Starr Pass

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CCA MEMBER REGISTRATION

(INCLUDES LUNCHEON AND MONDAY EVENING GALA EVENT)	POSTMARK BY 9/18/09	9/19/09 AND LATER	QTY	TOTAL
CCA MEMBER MEETING FEE	$1,150	$1,250		

NONMEMBER REGISTRATION

(*NONMEMBERS, PLEASE REVIEW PAGE TWO FOR CCA MEMBERSHIP INFORMATION)	POSTMARK BY 9/18/09	9/19/09 AND LATER	QTY	TOTAL
NON CCA MEMBER MEETING FEE	$1,550*	$1,650*		

ACCOMPANYING PERSON FEES

		QTY	TOTAL
CONTINENTAL BREAKFASTS & MONDAY EVENING EVENT	$125 (AGES 18 & OVER)		
	$ 90 (AGES 3 - 17)		
MONDAY LUNCH	$ 60		

SEMINARS AFTER THE MEETING

Seminar Dates Nov. 4 - 5, 2009	CCA MEMBERS	ANNUAL MEETING ATTENDEES	NONMEMBER/NON ANNUAL MEETING ATTENDEE	TOTAL
Expert Witness	$475	$495	$525	
Retiree Medical Update	$475	$495	$525	

MEETING FEE TOTAL ______________

I REQUIRE A SPECIAL MEAL: MUST BE ORDERED BY 9/18/09

		KOSHER	VEGETARIAN
MONDAY LUNCHEON	QTY		
MONDAY EVENING	QTY		

THE SPONSORS OPERATE THE CCA ANNUAL MEETING IN COMPLIANCE WITH THE REQUIREMENTS OF THE AMERICANS WITH DISABILITIES ACT. IF YOU ARE DISABLED AND REQUIRE ANY ACCOMMODATIONS TO PARTICIPATE IN THE MEETING, PLEASE STATE BELOW THE ACCOMMODATIONS THAT YOU REQUIRE:

____

____

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, November 1
5:00 - 7:05 PM

______ 1 Gray Book Review

Monday, November 2
8:00 - 10:15 AM

______ 2 General Session: It's not Web 2.0. It's not Web 3.0. It's simply life.
Keynote Speaker: Peter Shankman

10:35 - 11:50 AM

______ 3 Retiree Medical - Innovative Designs & "Cutting-Edge" Accounting
______ 4 "Why Do I Have to Provide You with an Incentive to Take Drugs?"
______ 5 What's Up in Washington?
______ 6 Wrap-up in Nori: Overview of Pensions in Japan
______ 7 No Country for Old Men (and Women) Trends & Longevity Hedges
______ 8 Public Employee Retirement Plan GASB
______ 9 "Check Your WRERA View Mirror"
______ 10 It's a Small World After All

2:15 - 3:30 PM

______ 11 IAS and FAS - How to Help Companies Make the Transition from US GAAP to IFRS
______ 12 Late Breaking Developments
______ 13 Serving the Interest of the Public
______ 14 If We Build It, Will They Come? A Retirement 20/20 Update
______ 15 Increasing Your Personal Actuarial Value
______ 16 A Case Study in Workforce Planning
______ 17 Retiree Medical: Still in the Trenches
______ 18 Consumer Driven Healthcare - Emerging Data & Trends

3:50 - 5:05 PM

______ 19 Plan Design - "Taking it to the Limit"
______ 20 New Buyer Perspective
______ 21 GASB 43/45: Raiders of the Not-So-Lost ARC
______ 22 Healthcare Reform - Budget Implication
______ 23 I Have a Friend Who... An Ethics Workshop
______ 24 DC Plans - Is That Your Final Answer?
______ 25 Are You Smarter Than an Actuarial Student?
______ 26 Asset Liability Modeling Today - Liability Driven Investing Approaches

Tuesday, November 3
8:00 - 9:40 AM

______ 27 "The Good, The Bad, and The Ugly" PPA-Unanswered Questions
______ 28 Workshop on Public Employee Retirement Systems (Part I)
______ 29 EACAs, QACAs, and MRD Waivers
______ 30 When the CFO says: "*!?*!!?"
______ 31 Case Studies from Health Data Warehouse Users
______ 32 Debate: A National Care Record Database, For or Against?
______ 33 X-Men and Other Super Heroes: Expatriate Benefits and Compensation
______ 34 "Hang "Em High" - Executive Compensation Issues in Today's World

Tuesday, November 3
10:00 - 11:40 AM

______ 35 Blazing Saddles: Underfunded Plans and the PBGC
______ 36 "Go to Health"
______ 37 DC Rodeo - How to Get Employees in the Game and Help Them Stay on Top when the Ridging Gets Rough
______ 38 Legislative and Regulatory Update
______ 39 Return of the Workshop on Public Employee Retirement Systems (Part II)
______ 40 Spanning the Globe "and nobody got hurt"
______ 41 What's in it For Me? Communicating Complex Concepts

12:15 - 2:20 PM

_______ 42 The ASB and You: Something Old, Something New, Something Borrowed, Something Blue

3:00 - 6:00 PM

_______ **Committee for Smaller Actuarial Consulting Firms Networking Forum**

Wednesday, November 4
8:00 - 9:15 AM

______ 43 Multi-employer Workshop
______ 44 Communicating Uncertainty
______ 45 Dances with Wolves
______ 46 ERM - Actuaries and Credentials
______ 47 Is Retiree Drug Subsidy (RDS) the Best Approach for Employers - or - RDS Alternatives?
______ 48 Physician Perspectives on Healthcare Direction
______ 49 Stand By Your Plan

9:30 - 10:45 AM

______ 50 Impact of the Economic Downturn on Employers' Health and Welfare Benefits
______ 51 Medicare Futures
______ 52 Life Insurance for Pension Actuaries
______ 53 If I Could Do It All Over Again - Retirement Plan of the Future
______ 54 Convergence with IAS
______ 55 Dialogue with the IRS
______ 56 Seeing the Forest for the Trees: Bringing Value Back to the Actuary-Client Relationship

11:00 AM - 1:00 PM

______ 57 Closing General Session - ABCD Hearing

SEMINARS AVAILABLE AFTER THE MEETING

EXPERT WITNESS

RETIREE MEDICAL UPDATE

Wednesday, November 4 - 2:00 - 6:00 PM
Thursday, November 5 - 8:00 AM - Noon

You won't want to miss these uniquely focused events!

Please check off box on registration form and make appropriate additional payment.