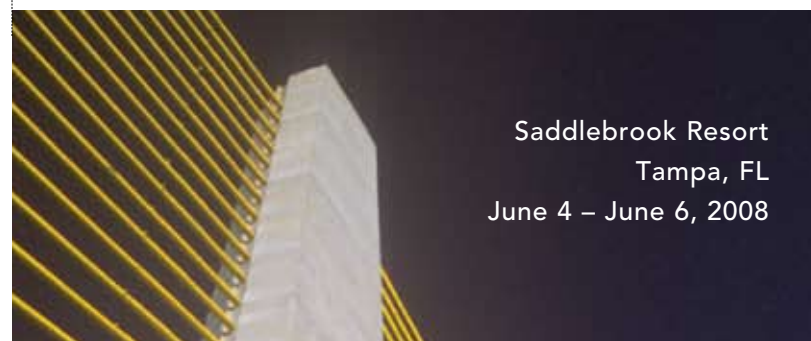




Employee Benefits

SPRING MEETING

Knowledge for Today. Insight for Tomorrow.



Saddlebrook Resort
Tampa, FL
June 4 – June 6, 2008

Program and Registration

Employee Benefits

SPRING MEETING

Knowledge for Today. Insight for Tomorrow.



Jointly Sponsored by the Society of Actuaries and
Conference of Consulting Actuaries

Meeting Registration

June 4 – 6, 2008
Saddlebrook Resort
Tampa, FL

PLEASE COMPLETE THIS FORM AND RETURN IT WITH THE APPROPRIATE FEE (U.S. FUNDS ONLY) TO:

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

Phone: (847) 719-6500
Online registration available at:
www.ccaactuaries.org

PREFERRED NAME ON BADGE: _____

NAME: _____

TITLE: _____

COMPANY: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____

E-MAIL: _____

SESSION REGISTRATION:

Attendees must register for the session they plan to attend in each time slot. Please indicate your first, second and third choice as this will assist us in accommodating the maximum number of attendees per session. Any on-site session changes from preregistered seminar/sessions may be

made only after preregistered attendees are accommodated within the session and then seats are filled on a first-come/first-served basis. **Please register for your sessions no later than May 10, 2008.**

WEDNESDAY, JUNE 4, 2008

- 1:00 – 2:30 PM
 - Pension Protection Act – Part 1
 - Health Benefits - Part 1
 - Retirement 20/20 – Part 1
- 2:45 – 4:15 PM
 - Pension Protection Act – Part 2
 - Health Benefits - Part 2
 - Retirement 20/20 – Part 2
- 4:30 – 5:45 PM
 - Pension Protection Act – Part 3
 - Accounting
 - Multi-employer Workshop

THURSDAY, JUNE 5, 2008

- 8:00 – 9:30 AM
 - General Session
- 10:00 – 11:30 AM
 - Defined Contributions – Part 1
 - Public Plans – Part 1
 - Late Breaking Developments
- 1:15 – 2:45 PM
 - Defined Contributions – Part 2
 - Public Plans – Part 2
 - Dialogue with the IRS
- 3:15 – 4:45 PM
 - Defined Contributions – Part 3
 - Public Plans – Part 3
 - Non-qualified Potpourri

FRIDAY, JUNE 6, 2008

- 8:00 – 9:15 AM
 - Investment/Termination – Part 1
 - Consulting Skills – Part 1
 - Professionalism – Part 1
- 9:30 – 10:45 AM
 - Investment/Termination – Part 2
 - Consulting Skills – Part 2
 - Professionalism – Part 2
- 11:00 – 12:15 PM
 - Investment/Termination – Part 3
 - Professionalism – Part 3
 - Dialogue with the IRS (repeat)

Registration Fees by April 30, 2008

- SOA/CCA Members: \$950
- Non-member: \$1,175

Registrations received after April 30, 2008

- SOA/Conference Members: \$1,050
- Non-member: \$1,275

Hotel Information:

Please call the Saddlebrook Resort at 813-973-1111 and ask for the Employee Benefits Spring Meeting room block.

visit www.ccaactuaries.org for the latest information.

Employee Benefits
SPRING MEETING



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

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Actuaries
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The Society of Actuaries and Conference of Consulting Actuaries are pleased to present a unique meeting experience dedicated solely to the needs of the employee benefits actuary. The joint program committee has developed a robust and diverse seminar-based curriculum that includes thought leadership on the future of public pension plans, health benefit issues, retirement systems as well as a mix of business and core technical knowledge sessions to meet your continuing professional development needs.

MEETING FORMAT

The meeting is comprised of eight embedded seminars including: professionalism, retirement 20/20, investment/termination, health benefit issues, defined contribution services, public plan happenings, consulting issues and

the Pension Protection Act. The seminar format permits in-depth exploration of these eight topics and we have also included a few free standing, hot topics sessions.

Employee Benefits Spring Meeting Schedule

Wednesday, June 4, 2008			
1:00 – 2:30 PM	Pension Protection Act – Part 1	Health Benefits - Part 1	Retirement 20/20 – Part 1
2:45 – 4:15 PM	Pension Protection Act – Part 2	Health Benefits - Part 1	Retirement 20/20 – Part 2
4:30 – 5:45 PM	Pension Protection Act – Part 3	Accounting	Multi-employer Workshop
Thursday, June 5, 2008			
8:00 – 9:30 AM	General Session		
10:00 – 11:30 AM	Defined Contributions – Part 1	Public Plans – Part 1	Late Breaking Developments
1:15 – 2:45 PM	Defined Contributions – Part 2	Public Plans – Part 2	Dialogue with the IRS (repeat)
3:15 – 4:45 PM	Defined Contributions – Part 3	Public Plans – Part 3	Non-qualified Potpourri
Friday, June 6, 2008			
8:00 – 9:15 AM	Investment/Termination – Part 1	Consulting Skills – Part 1	Professionalism – Part 1
9:30 – 10:45 AM	Investment/Termination – Part 2	Consulting Skills – Part 2	Professionalism – Part 2
11:00 AM – 12:15 PM	Investment/Termination – Part 3	Dialogue with the IRS (repeat)	Professionalism – Part 3

Pension Protection Act

The Pension Protection Act has been described as the most significant pension legislation since the enactment of ERISA. It has required actuaries to change their thinking about measuring liabilities and funding policy. A full year into the program we are beginning to get a better grasp on the effects.

PPA 1 - PPA In Practice - What Have We Learned? 1.8 EA Core
Moderator: Ellen L. Kleinstuber
Speakers: Tonya B. Manning, Brian C. Donohue, Kenneth A. Steiner

PPA 2 – PPA Recent Guidance 1.8 EA Core
Moderator: Ellen L. Kleinstuber
Speakers: David R. Godofsky, Ethan E. Kra, Marty Pippins

PPA 3 – So Close... and Yet So Far 1.5 EA Core
Moderator/Speaker: Ellen L. Kleinstuber
Speakers: David R. Godofsky, Marty Pippins

Retirement 20/20: Seeing the Future of Retirement

The SOA's Retirement 20/20 project kicked off in 2006. The goal of the project is to envision new retirement systems for the 21st century that don't necessarily fit today's definitions of DB or DC. The presentations made at this seminar provide you a chance to hear where the program is and how it is proceeding.

Future of Retirement Part 1: Report from the Conference: Headlines 1.8 EA Noncore

Future of Retirement Part 2: Structured Input on Emerging Themes 1.8 EA Noncore

Consulting Skills Seminar

There is more to being a pension actuary than the technical knowledge exams and work can teach you. Speakers at this seminar focus on the consulting skills necessary to manage client expectations and projects to help you become a better consulting actuary.

Consulting Skills Part 1: The Plain English Actuary: Oxymoron? 1.5 EA Noncore

Moderator/Speaker: Kathryn Ellis Speaker: Jonathon E. Joss

Consulting Skills Part 2: How to Build Relationships 1.5 EA Noncore

Speakers: Gary A. Pines, Erica M. Peters

Investment/Termination Seminar

It's a new world in the plan freeze and termination world. Speakers in this three-part track first explain new investment strategies, in the second track speakers review liability matching, and in the third track they look at various aspects of risk transfer.

Investment/Termination Part 1 – What are all the Investment Strategies?

1.5 EA Noncore
Moderator: Daniel P. Cassidy Speaker: Gordon J. Latter

Investment/Termination Part 2 – Liabilities Matching 1.5 EA Noncore

Moderator: Daniel P. Cassidy Speaker: Sean McShea

Investment/Termination Part 3 – Risk transfer 1.5 EA Core

Moderator: Daniel P. Cassidy Speaker: Ari N. Jacobs, Brad Belt

Public Pension Plans – Today and Tomorrow

Speakers at this seminar examine the current state of public pension plans in the U.S., including a discussion of some of the challenges and criticisms they are facing. Presenters then focus on how a disciplined review of funding policies and financial disclosures might both reveal some causes and provide some solutions to those challenges.

Public Plans Part 1: Current State of the Public Retirement Sector 1.8 EA Noncore

Public Plans Part 2: Challenges and Criticisms 1.8 EA Noncore
Moderator/Speaker: Paul Angelo

Public Plans Part 3: Funding and Disclosure 1.8 EA Noncore
Moderator/Speaker: Paul Angelo, Karen Steffen

Health Benefit Issues for Pension Actuaries

Brought on by the adoption of FAS 106, retiree medical valuation work has become a regular part of the employee benefits "domain." There are many other facets of healthcare that a pension actuary should be aware of. The speakers at this seminar cover a variety of technical actuarial healthcare topics to help pension actuaries.

Health Benefit Issues Part 1: Issues for Pension Actuaries

Up to 1.8 EA Noncore
Moderator/Speaker: Dale H. Yamamoto Speaker: Bob Walt

Health Benefit Issues Part 2: GASB 43/45 1.8 EA Noncore

Moderator: Dale H. Yamamoto
Speakers: Jason Franken, Stephen T. McElhane

Defined Contribution Seminar

It's a new world in the plan freeze and termination world. The increasing pressure to align total rewards strategies, including 401(k) plans, with business strategies raises many critical questions about total rewards, their effect on employees, and how to design total rewards programs that keep employees engaged, motivated, and contributing to business goals. The push for alignment with corporate strategy, the retirement industry's evolution toward 401(k) plans, and plan sponsors continued activity in fulfilling their fiduciary responsibilities, managing their vendors, and educating their employees, this seminar is filled with meaningful insight for actuaries that are already involved with defined

contribution plans as well as those who are not. In this three-part track first review defined contribution plan basics, second cover employer risk and retirement adequacy, and third, they examine distributions from defined contribution plans.

Defined Contribution Part 1 – Let's Run Through the Rules?

1.8 EA Noncore
Moderator: Mark A. Dzierzak Speaker: Terri Lynn W. Vaughan

Defined Contribution Part 2 – DC Investments and Distributions

.9 EA Core .9 EA Noncore
Moderator: Mark A. Dzierzak Speaker: Daniel P. Cassidy

Defined Contribution Part 3 – A Unique Perspective on Retirement

.9 EA Core .9 EA Noncore
Moderator: Mark A. Dzierzak Speaker: Zvi Bodie

Professionalism Seminar

Professionalism is always a hot topic as our requirements tighten and more emphasis is placed on ethics and professional judgments. This seminar consists of three parts with speakers focusing on the new ASOPs and the Qualification Standards and other issues affecting pension actuaries, post PPA effects, setting assumptions, our current code, and new and proposed professional standards that affect us all. The speakers review these standards including the revised guide to professional conduct and standards on asset valuation methods, data quality, modeling, and qualification.

Professionalism - Part 1: New Pension Actuarial Standards of Practice

1.5 EA Core
Speakers: Lawrence J. Sher, Kenneth A. Kent, Ellen L. Kleinstuber

Professionalism - Part 2: New Qualification Standards and SOA/CCA CPD Requirements 1.5 EA Core

Speakers: Sheila Kalkunte, Emily K. Kessler, Lance Weiss

Professionalism - Part 3: Actuarial Communications 1.5 EA Core

Speakers: Tonya B. Manning, Lawrence J. Sher, Kenneth A. Kent

General Session

Why Do Firms Offer Risky Defined Benefit Pension Plans?
Speakers: David C. Love, Paul Smith 1.8 EA Noncore

Lunch

Work issues in Today's Military
Have you always wondered about military benefits and how they fit into the whole actuarial spectrum?
Speaker: Colonel Charles T. Barham

Breakouts:

Dialogue with IRS 1.8 EA Core
Moderator: Donald J. Segal Speaker: Marty Pippins

Late Breaking Developments 1.8 EA Core
Moderator/Speakers: Ethan E. Kra, John H. Lowell

Accounting - An Accounting of the Accounting Rules 1.5 EA Noncore
Moderator: Howard A. Freidin

Speakers: Jerrold Dubner Marcus H. Rafiee

Non-qualified Potpourri .9 EA Core/.9 EA Noncore
Moderator/Speaker: John H. Lowell Speaker: Warner Anthony

Multi-employer Workshop 1.5 EA Core
Moderator/Speaker: Rocky Joyner Speaker: Joseph F. Hicks

For the most up-to-date information visit
www.cactuaries.org