



# Non-Qualified Deferred Compensation Plan Basics and Trends

Tuesday, February 27 | 7:30am – 10:00am

McMenamins Kennedy School | Portland, OR

\$35 - PNW ISCEBS Chapter, PHRMA and SW SHRM Members

\$45 - Non-Member/Guests

Register online at the [Pacific Northwest Chapter website](#).

We appreciate your registration by February 22, but walk-ins will be welcome at the event.

A nonqualified deferred compensation (NQDC) plan is a corporate benefit that is most often used to recruit, retain, reward and incentivize those key employees on whom the success of the business depends. It also provides plan participants with the means to bridge their retirement gap caused by qualified plan limitations and help maintain their standard of living in retirement.

Chris Fernandez, Senior Consultant at Principal Financial and Mike van der Velden, Senior Vice President at USI will lead the session to help you better understand plan design options; operational considerations; and finance techniques for NQDC plans. **What you will learn:**

#### Why Companies Utilize NQDC Plans

- Benefits for employers and employees

#### Plan Design Techniques

- Problems to solve
- Plan design alternatives for reward and retention

#### Financing Options

- Mutual Funds vs Corporate Owned Life Insurance (COLI)
- Financial modeling and cash flow analysis

#### Operational Considerations

- Administrative Requirements
- Participant Communications

#### Case Studies

**Professional Development Credits available by attending this session:**



This program qualified for **2 CEBS continuing professional education (CPE) credits**.



This program is Oregon Insurance Approved for **2 Life and Health credits**.



This activity has been approved for Recertification Credit Hours Awarded: **2 Specified Credit Hours**: HR (General) recertification credit hours toward aPHR™, PHR®, PHRca®, SPHR®, GPHR®, PHRi™, SPHRi™ recertification through HR Certification Institute's® (HRCI®).



This program qualifies for **2 PDCs toward SHRM-CP and SHRM-SCP recertification**.



This program is designed to meet the CE requirements of the ASPPA CE program and will qualify for **2 ARA continuing education (CE) credits**

#### EVENT SCHEDULE

7:30 – 8:00 Networking & Lunch

8:00 – 10:00 Program Presentation

PORTLAND, OREGON EVENT