This half-day session will bring you up-to-the-minute information to assist you with your 401(k) and 403(b) plans. We have three expert speakers to address current defined contribution plan topics and share their perspective as described below.

Mabel Capolongo, the Philadelphia regional director for the Department of Labor's Employee Benefits Security Administration (EBSA) will provide updates on the following:

- EBSA enforcement initiatives for 2010
- Voluntary correction programs
- E-Fast electronic filing update.

Hollis T. Hurd, J.D., founder of The Benefits Department, a boutique employee benefits law firm, will address the following:

- Recent regulations such as hardship distributions relating to beneficiaries
- Investment concerns including selection of default investments, "stock drop" cases and diversification, and investment policy statements
- Investment advice for participants.

Kathleen M. Lese, CPA and executive director with Ernst & Young, will provide information on such audit hot topics as:

- New accounting pronouncements
- Regulatory oversight
- Key issues for plan audits
- 403(b) plan audits.

Date

February 17, 2010 (Wednesday)

Time

11:45 a.m.-12:00 noon—Registration
12:00 noon-12:45 p.m.—Lunch
12:45-2:45 p.m.—EBSA Topics
3:00-4:00 p.m.—Regulatory Topics
4:00-5:00 p.m.—Audit Topics

Location

The Regional Learning Alliance
850 Cranberry Woods Drive
Cranberry Township, PA 16066

R.S.V.P.

By February 12, 2010
Contact Jason A. Kurz at
jkurz@standard.com
Phone: (412) 227-3588
Fax: (412) 227-1505

Cost

$75—Members
$85—Nonmembers/Guests
Cancellations: Participants canceling after February 12 will be billed for the cost of the program.

Register by Mail

Make check payable and mail to:
Greater Pittsburgh Chapter—ISCEBS
c/o Jason A. Kurz
The Standard
Standard Insurance Company
One Gateway Center
420 Ft. Duquesne Blvd.
Suite 1300
Pittsburgh, PA 15222

Tax ID #25-1503564

Speakers

Mabel L. Capolongo, Philadelphia Regional Director, Department of Labor

Ms. Capolongo has been the Philadelphia regional director for DOL's EBSA since 1998. Her jurisdiction covers Delaware, the District of Columbia, Pennsylvania, Maryland, Virginia, West Virginia and southern New Jersey. Ms. Capolongo began her career with the Department of Labor and has served as a staff accountant, auditor and senior investigator. She received the Department's Distinguished Career Service Award in 1995 as well as several other special achievement awards. Ms. Capolongo has her M.B.A. degree in finance from American University and is a CPA.

Hollis T. Hurd, Founder, The Benefits Department

Mr. Hurd founded The Benefits Department, which is a law firm with a practice limited to employee benefits, including benefits litigation. Prior to that endeavor, he was a partner in the law firms of Reed Smith Shaw & McClay and Jones, Day, Reavis & Pogue, as well as serving as in-house benefits and labor counsel at Siemens-Allis in Atlanta. Mr. Hurd's experience includes designing, drafting, installing and administering employee benefit plans. His litigation experience includes five victories in the U.S. Supreme Court. Mr. Hurd has been selected and included in *The Best Lawyers in America* since the 1993-1994 edition. He received his J.D. degree from the University of Pennsylvania Law School.

Kathleen M. Lese, CPA, Executive Director, Employee Benefit Plan Services Group, Ernst & Young

Ms. Lese is a CPA and an executive director with Ernst & Young's Employee Benefit Plan Services Group. She has over 19 years of experience and is responsible for providing assurance and advisory services, technical and other assistance to clients. Ms. Lese also facilitates benefit plan audit training for Ernst & Young staff and serves as a quality control reviewer on Ernst & Young's audit quality review teams. She has her B.S. degree in accounting from the Pennsylvania State University. Ms. Lese is currently working toward her CEBS designation.

Defined Contribution Plan Hot Topics Workshop

February 17, 2010

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Registration Form

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