

Network Luncheon

The Central Ohio Chapter's next network luncheon will be held on Wednesday, March 24th at The Motorists Insurance Group Building (Downtown) at 471 East Broad Street, Columbus OH 43215.

Network luncheons are educational and give you the opportunity to enjoy a delicious lunch while networking with other benefits professionals. To register, please complete the attached form and return it to N. Kay Penn no later than Wednesday, March 17th.

The Certified Employee Benefit Specialist (CEBS) program, cosponsored by the International Foundation and the Wharton School of the University of Pennsylvania, is a series of eight courses on employee benefits that leads to a professional certification. To request information on becoming a Certified Employee Benefit Specialist, call a registration assistant at 262-786-6710, ext. 8479 or send a fax to 262-786-8650 and ask for a FREE catalog.



International Society
Of Certified Employee Benefit Specialists
Central Ohio Chapter – ISCEBS
P O Box 665
Pickerington OH 43147-9998

Central Ohio
Chapter
ISCEBS

NETWORK LUNCHEON



***Common Employee
Benefit Plan Issues***

Noted on Audit

Wednesday, March 24, 2010

11:30 a.m. – 1:00 p.m.

Common Employee Benefit Plan Issues Noted on Audit

- Fiduciary Issues:
 - How well do you understand the fiduciary responsibilities that are required of plan sponsors for qualified plans? Retaining documentation of this understanding and the activities it entails is often key.
- Internal Reconciliation by Plan Sponsor:
 - Early, periodic review and reconciliation of the records of various entities involved in a plan's operating environment can highlight control and process issues and prevent the further promulgation of errors.
- Plan Contribution Remittances
 - Always a hot-button and much-debated issue, the timeliness of remittance of contribution to a plan trustee is often the easiest way for a plan to fall out of compliance. How can this be addressed?
- Compensation Definition/Plan Document Inconsistencies
 - It's your ERISA attorney's responsibility to know and periodically review your plan's governing document, right? Not exclusively. Whether your plan is an adoption of a prototype or a proprietary document, certain details within that are referenced on a daily basis can slip through the administrative cracks.

Register by March 17, 2010

Speakers:

**Michelle H. Buckley, Vice President,
Practice Leader, Benefit Plan
Assurance Group, Meaden & Moore**

Ms. Buckley has 16 years of public accounting experience serving clients in the manufacturing and distribution industries.

As a practice leader of the firm's employee benefits and consulting practice, Ms. Buckley has had extensive experience with qualified benefit plan audits and the unique complexities of these engagements. She understands the risks to plan sponsors and continuously offers suggestions for improvement to minimize any potential fiduciary liability.

John Carroll University, Bachelor of Science in Accounting

**Brian D. Dunfee, Manager,
Assurance Services Group, Meaden
& Moore**

With 8 years in public practice, Mr. Dunfee has extensive audit experience, especially in the field of employee benefit plan audits. He has a strong understanding of the operations and compliance of many types of employee benefit plan audits, which he developed through preparation and supervision of those plans.

OSU, Bachelor of Science in Accounting

Registration Form

Topic: Common Employee Benefit Plan Issues Noted on Audit
Date: March 24, 2010
Time: 11:30 a.m. – 1:00 p.m.
Cost: Check either (includes educational program, lunch and parking):

- Central Ohio Chapter Member \$15.00
 Non-Member \$25.00

Name

Company

Address

City State Zip

Phone Fax

Make checks payable to:
Central Ohio Chapter, ISCEBS

By mail to: N. Kay Penn, CEBS
1724 Clifton Avenue
Columbus OH 43203

By fax to: 614.564.1543

Questions? Call N. Kay Penn – 614.628.8431