The phrase “nondiscrimination testing” strikes dread into many benefits professionals and the SECURE Act has added more complexity on top of it. Join us as we go “back to the basics” with a broad overview of the nondiscrimination rules that apply to qualified defined benefit and defined contribution plans, under Internal Revenue Code Section 401(a)(4), 410(b), and 401(a)(26). In addition to providing background on why nondiscrimination testing is required, this presentation will also focus on common areas of concern for plan sponsors and what forms of relief the IRS has recently provided to address these concerns.

**Top Take Aways**
- The basic concepts of nondiscrimination testing and why it’s required
- Recent nondiscrimination relief provided under the SECURE Act
- Steps plan sponsors can do if they are in danger of failing nondiscrimination

**Speaker:** Jarred D. Wilson, MAAA, EA | Vice President & Consulting Actuary, Segal

Mr. Wilson is a Vice President and Consulting Actuary in Segal’s New York office, with 22 years of experience. He has specialized expertise in a wide range of employee benefit services, including nondiscrimination testing, plan design, actuarial analysis development and funding strategies in alignment with corporate objectives, and the determination of accounting implications associated with ongoing plan operations. He also works with corporations on benefit de-risking strategies and plan management. Mr. Wilson has extensive experience consulting on plan design alternatives in conjunction with compliance testing under IRC Sections 401(a)(4) and 410(b), as well as corporate pension valuations under ERISA and PPA, and FAS and IAS pension accounting. He also has experience with post-retirement health and welfare benefit plans and has worked on a number of special projects including plan redesign, curtailments, and M&A. He consults to both large and small pension plan sponsors, including corporate and nonprofit clients.

Mr. Wilson earned a BS in Actuarial and Mathematical Science from the University at Albany, State University of New York. He is a Member of the American Academy of Actuaries and an Enrolled Actuary.

**Professional Development Credits available by attending this session (hosted through the PNW Chapter of ISCEBS)**

- Qualifies for 1 CEBs continuing professional education (CPE) credit
- Approved for 1 PDC toward SHRM-CP and SHRM-SCP recertification
- Valid for 1 HR (General) recertification credit toward aPHR™, aPHRi™, PHR®, PHRca®, SPHR®, GPHR®, PHR™ and SPHR™recertification through HR Certification Institute® (HRCI®)
- Qualifies for 1 ASPPA continuing education credit.

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