

New York Metropolitan Area Chapter

International Society
of Certified Employee Benefit Specialists

August 10, 2021

WEBINAR: Employee Benefit Plans Form 5500 and Beyond Update

Please join us as our speakers, Louis F. LiBrandi, CEBS, Anthony Bianchi, CEBS and Ashley Mayer, CPA of PKF O'Connor Davies, LLP, discuss changes and proposed updates affecting employee benefit plans, including:

- 2020 Changes to the Form 5500/8955-SSA
- Review of the Schedules/attachments to the Form 5500
- Employee Benefit Plan Audit Update
- Regulatory Agendas for IRS and DOL

(There will be a NY Metro Chapter Members-Only Networking Event immediately following the webinar. Details will be distributed to all NY Metro Chapter members who register for the webinar.)

DATE: Tuesday, August 10, 2021

TIME: 8:45 - 10:00 am Eastern - Webinar
10:00 - 11:00 am Eastern - NY Metro Chapter Members-Only
Networking Event

LOCATION: 

COST: FREE

REGISTRATION: Please [click here](#) to register.
Upon registration you will receive a confirmation email.

RSVP: By Monday, August 9, 2021 (5 PM)

CANCELLATIONS: Participants who have registered for this event and are not able to attend, please notify us no later than 5:00 pm on August 9th.

QUESTIONS: Please contact Sue Andres at nymetrochaptercebs@gmail.com.

Continuing Education Credit

To receive any continuing education credits, **REGISTRATION IS REQUIRED** in advance of the session. By rules of the various accreditation/certification entities, attendance will be monitored and reported back for CE.



This event qualifies for 1.5 CEBS Compliance credits.
Visit www.cebs.org/compliance for more information.



Approval pending for 1.25 hours of HRCI credit.



Approval pending for 1.25 hours of SHRM PDC credit.

SPEAKERS

Louis F. LiBrandi, CEBS
Principal, Employee Benefit Services Group
PKF O'Connor Davies, LLP

Louis F. LiBrandi is a Principal of the Employee Benefit Services Group of PKF O'Connor Davies, LLP. He has many years of extensive experience with employee benefit plans. A recognized expert on matters regarding the Form 5500, Louis speaks annually about this and other retirement plan topics for the New York Chapter of CEBS, and other organizations. He frequently provides guidance on satisfying the many qualification requirements of retirement (including 403(b) and 401(k)), nonqualified deferred compensation plans, and certain features of welfare/cafeteria arrangements. He frequently represents accounts under examination by the IRS and DOL. Louis has attained Fellowship status with the International Society Certified Employee Benefit Specialists and has attained the American College's Chartered Financial Consultant designation. He has also attained the TGPC designation from ASPPA.

Anthony Bianchi, CEBS
Supervisor
PKF O'Connor Davies, LLP

Anthony Bianchi is a Supervisor in the Employee Benefit Services Group of PKF O'Connor Davies, LLP, specializing in all aspects of employee benefit plan compliance, including the preparation, and filing of Form 5500 and other tax forms, nondiscrimination testing, plan document preparation and IRS & DOL correction programs. Prior to joining PKF in 2011, Anthony worked with AXA and Buck Consultants in their employee benefit practices. Anthony is a member of the Metro NY Chapter of CEBS, and served as Chapter president in 2018.

Ashley Mayer, CPA
Partner
PKF O'Connor Davies, LLP

Ashley Mayer is an Audit Partner with PKF O'Connor Davies, LLP. Ashley has nearly fifteen years of experience in public accounting. She specializes in audits of employee benefit plans. She has assisted in developing the firm's streamline approach to insure an efficient and effective audit and oversees 85 employee benefit plan audits annually. Ashley attends various employee benefit plan audit trainings each year and in June of 2021 became the Chair of the New York State Society, Employee Benefits Committee. Ashley is a member of the American Institute of Certified Public Accountants and New York State Society of Certified Public Accountants.

[Register Now!](#)

