

# REGISTRATION/2013

September 22-25, 2013

# ISCEBS Employee Benefits Symposium (13SYMP)

Westin Copley Place • Boston, Massachusetts

## CUSTOMER INFORMATION (Please print clearly)

Priority code **3SYW** Individual ID# or CEBS® ID# \_\_\_\_\_  
 First name \_\_\_\_\_ M.I. \_\_\_\_\_ Last name \_\_\_\_\_  
 Employer \_\_\_\_\_  
 Title \_\_\_\_\_  
 Address \_\_\_\_\_  Business  Home  
 City \_\_\_\_\_ State/Province \_\_\_\_\_ Country \_\_\_\_\_ ZIP/Postal code \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_ Last 4/3 digits of SSN/SIN \_\_\_\_\_ Date of birth (mm/dd/yyyy) \_\_\_\_\_

See our policies regarding your registration/cancellation/refund/record retention/photo release and privacy at [www.iscebs.org/policies](http://www.iscebs.org/policies).

## REGISTRATION INFORMATION

### REGISTER NOW!

#### ISCEBS Member Rates

#### International Foundation Corporate Member Rates

#### Special Guest Rates

#### Nonmember Rates

CEBS, CMS, GBA or RPA designees

Corporate nonmembers

CEBS student (completed at least one CEBS course by September 1, 2013)

#### New CEBS, CMS, GBA or RPA Graduates\*

Graduate member

Graduate nonmember

\*Earned designation between August 1, 2012 and September 15, 2013.

(If you earned your designation after August 1, 2012 and elected to go to the Conferment and Symposium in San Francisco, you must pay the regular registration fee for Boston.)

\*\*Includes 2013 ISCEBS membership.

†Includes a 2013 International Foundation membership for new members only.

#### Payment

The Symposium registration fee must accompany this registration form. Registration fees can be paid by check or credit card. If you wish to pay the registration fee in Canadian funds, please use the equivalent Canadian rate in effect at the time you submit the registration fee. *Note:* If you're unable to use a credit card for your hotel deposit, you may include one night's room rate in your check for the registration fee.

<b>Through August 15</b>	<b>After August 15</b>
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<input type="checkbox"/> \$1,025	<input type="checkbox"/> \$1,125
<input type="checkbox"/> \$1,025	<input type="checkbox"/> \$1,125
<input type="checkbox"/> \$825	<input type="checkbox"/> \$925

<input type="checkbox"/> \$1,170**	<input type="checkbox"/> \$1,270**
<input type="checkbox"/> \$1,170†	<input type="checkbox"/> \$1,270†

<input type="checkbox"/> \$1,170**	<input type="checkbox"/> \$1,270**
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#### Special Registration Fee

<input type="checkbox"/> \$825
<input type="checkbox"/> \$920**

Approximately what year did you begin working in employee benefits? \_\_\_\_\_

This is my first Symposium.

Level of responsibility  Senior management  Middle management  
 Operations  Other

#### CEBS Conferment (Sunday, September 22, 5:00 p.m.)

Yes, I plan to attend the ceremony and reception.

Guest's/children's name(s) \_\_\_\_\_

I am a  CEBS  GBA  RPA  CMS

#### Special Guest Registration

I am registering as a "guest" and have been invited by the following Society member or International Foundation corporate member.

Name \_\_\_\_\_  
*Note:* Your guest registration will not be processed until the member named has registered for the Symposium.

#### Sunday Afternoon Workshops Registration

Employer Open Discussion  
 Consulting Practice Owners Forum

#### Golf Outing

Please send me information on the golf outing.

#### Cancellation Policy

A \$60 administrative charge is imposed on all cancellations. Refund deadline is two weeks prior to the meeting. For more information regarding administrative policies such as complaint and refund, please call the Society office at (262) 786-8771.

## HOTEL

\$259 Single/double occupancy  No hotel required



Arrival date \_\_\_\_\_ Departure date \_\_\_\_\_ Number of persons \_\_\_\_\_ Special requests \_\_\_\_\_

A hotel deposit of one night's room rate is required.

Please use a credit card to secure your hotel deposit. The hotel accepts:

VISA  MasterCard  Discover  Amex  Diner's Club

Credit card # \_\_\_\_\_ Exp. date \_\_\_\_\_

	Smoke-free property
	Special assistance? <input type="checkbox"/> Yes <input type="checkbox"/> No

## CONTINUING EDUCATION CREDIT

\$25 continuing education service charge due at time of registration. The International Society will apply for CE credit based on requests. You must indicate the profession for which credit is requested. The fee does not apply to CEBS CPE credit.

Actuary  Attorney/Lawyer  CPA  Insurance Producer/Agent\*  PHR/SPHR/GPHR  CFP  Other, specify \_\_\_\_\_

Licensed in the state/province of \_\_\_\_\_ License/NPN/BAR/CPA # \_\_\_\_\_

\*Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Alberta requires the Society to submit sessions for review 15 days prior to the program. Late requests could preclude insurance producers/agents from earning credit.

CE inquiries: (262) 786-6710, option 2; or e-mail [continuinged@ifebp.org](mailto:continuinged@ifebp.org). **NOTE: Requests made for CE credit on this form do not guarantee administration of credit.**

Visit us on the Web at  
[www.iscebs.org](http://www.iscebs.org)

## PAYMENT INFORMATION

Full payment must accompany order. Make check payable to International Society.

Check # \_\_\_\_\_ \$ \_\_\_\_\_

VISA  MasterCard  Discover  American Express (U.S. only)

Credit card # \_\_\_\_\_ Exp. date \_\_\_\_\_

Cardholder's name (print) \_\_\_\_\_


## REGISTRATION/ORDER SUMMARY


Symposium \$ \_\_\_\_\_


Continuing education service fee (\$25) \$ \_\_\_\_\_

**Total (U.S. funds) \$ \_\_\_\_\_**

 Register online at [www.iscebs.org](http://www.iscebs.org).

 Fax your registration form with credit card number: (262) 364-1818

 Mail the registration form with check or credit card number to:  
International Society, P.O. Box 681092  
Chicago, IL 60695-2092 USA

 For information, e-mail [iscebs@iscebs.org](mailto:iscebs@iscebs.org), or phone (262) 786-8771



**International Society**  
of Certified Employee Benefit Specialists

# Session Selection Form

## Monday Luncheon

12:00 noon-1:15 p.m.

If you would like to participate in these topics, please indicate first and second choice by the two topics that interest you most.

### General Topics

- Absence Management
- ACA Communications
- ACA Compliance
- ACA Cost
- ACA Exchanges
- ACA Opportunities for Plan Sponsors
- 401(k) Plans—Fee Disclosure
- Global Benefits
- Long-Term Care
- Medical Homes
- Mental Health Strategies
- Pharmacy Benefits
- Retiree Liability/Costs
- Retirement Readiness
- Talent Management
- Target-Date Funds
- Wellness ROI

### Canada-Specific Topics

- Pharmacy/Drug Pooling
- Pension Reform

**We need your assistance—if you would like to be a group facilitator, please print your name and topic preference.**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Topic Preference

## Sunday Afternoon Workshops

2:30-4:30 p.m.

- Employer Open Discussion
- Consulting Practice Owners Forum

## Monday

12:00 noon-1:15 p.m.

- Consulting Practice Owners Luncheon Workshop

## Monday, September 23

8:15-9:15 a.m.

- Are Employee Benefits Forever?

9:30-10:30 a.m.

- U.S. Legislative Update
- Canadian Legislative Update

11:00 a.m.-12:00 noon

- Transitioning From Health Care Volume to Value: Better Quality, Better Cost, Better Patient Experience
- Closing the Retirement Expectations “Gap”: Variations in Demographics, Sources of (Mis)Information and the Implications of a “Bad” Guess
- Gaining Corporatewide Support to Develop and Implement a Five-Year Strategy, Dramatically Shifting Culture and Benefits
- Organizational Impact of Mental Health Issues

1:30-2:30 p.m.

- Specialty Pharmacy: Examine, Optimize and Manage
- Retirement: For Better Outcomes, Start With a Better Design
- Health Care Reform in an Interconnected World: Decisions and Implications for Cross-Border Employers
- Determining a Wellness ROI

2:45-3:45 p.m.

- Retiree Medical Solutions—The Case for Change
- Financial Wellness—Financial Planning as an Employee Benefit
- The Power of Two: The Dual Savings Path of HSAs for Both Health Care and Retirement
- The Journey From DB to DC: Strategies for Success

4:00-5:00 p.m.

- Health Care Reform Strategy: Your Next Move
- Benchmarking Target-Date Funds: Art, or Science?
- The Current State of the Long-Term Care Insurance Industry
- Canadian Topic To Be Announced

## Tuesday, September 24

8:30-9:30 a.m.

- U.S. Legal Update: Spotlight on Disability Cases
- Canadian Legal Update

10:00-11:00 a.m.

- Early Insights From the First National Multicarrier Corporate Exchange
- Latest Developments in Retirement Income Solutions
- How Boomer Caregiving Impacts Employer Health Costs and Ruins Wellness Efforts and Employee Productivity
- The New Drug Pooling Arrangement

## Tuesday, September 24 (cont.)

11:15 a.m.-12:15 p.m.

- Health Care Reform Action Steps at the 11th Hour: Are You Ready?
- Understand “Auditor-Ese” and Save Yourself a Headache
- It’s a Mobile World: How Smartphones and Tablets Impact Your HR Efforts

12:15-1:30 p.m.

- Fellowship Recognition Luncheon

1:30-2:30 p.m.

- The Medical Home: The Cure for What’s Ailing Health Care
- Fee Leveling in DC Plans: Disclosure Is Just the Beginning
- ACA and Competitive Advantage in the Talent Wars
- Case Study: How the Shoemaker’s Children “Fit” Into Retirement Planning

2:45-3:45 p.m.

- Navigate the Stormy Seas Ahead—A Case Study of a Creative Funding Vehicle for the New Health Care Reality
- Optimizing 401(k) Plan Performance and Management of Fiduciary Liability
- Benefits and HR in Mergers and Acquisitions
- New Pension Standards in Western Canada

4:00-5:00 p.m.

- Ask the Expert Workshop
- Workshop: Retirement Topic To Be Announced
- Workshop: ACA Compliance Discussion
- Workshop: Tips for Paper-to-Electronic Records Transition

## Wednesday, September 25

8:00-9:00 a.m.

- Increase Employee Engagement With Games

9:15-10:15 a.m.

- Consumers of Health Care vs. Sponsors of Health Care Plans—Are Perceptions Reality?
- Managing Risks in Defined Benefit Plans
- Crossing the Border: Temporary Employee Benefits

10:30-11:30 a.m.

- Culture Wellness—Embedding Wellness Into Your Organization
- Generational Crossroads: Communicating With Today’s 401(k) Participants
- How States’ Conflicting Marriage and Domestic Partnership Laws Impact Employee Benefits
- Canada Bill 377—Financial Transparency or Undue Burden?

11:45 a.m.-12:45 p.m.

- Daring to Reward Biometrics in the Public Sector
- Retirement Session To Be Announced
- What Is the Future Role of a Benefits Professional?

# Symposium