

MEETING AGENDA

Sunday - June 8

1:00 – 6:00 pm **Registration**

Monday - June 9

7:30 – 8:30 am **Registration**

7:30 – 8:30 am **Continental Breakfast with Exhibitors**

8:30 – 8:45 am **Welcome and Opening Remarks**

8:45 – 9:45 am **Marketplace Update** Bob Wuelfing, *RG Wuelfing & Associates*
Rich Magner, *McCamish Systems*

9:45 – 10:15 am **Refreshment Break with Exhibitors**

10:15 – 11:00 am **Keynote Address - Department of Labor
Regulatory Initiatives** Bradford Campbell, *Department of Labor*

11:00 – 12:15 pm **Key DOL Guidance:
Outlook for 2008 and 2009** Tom Schendt, *Alston & Bird (Moderator)*
Tom Skrobe, *BlackRock*
Jeffrey Turner, *Department of Labor (Invited)*
Kristen Zarenko, *Department of Labor (Invited)*

12:30 – 1:30 pm **Luncheon**

1:30 – 2:30 pm **Ask the CEOs - Service Model Strategies** Bob Wuelfing, *RG Wuelfing & Associates (Moderator)*
San Asuti, *Congruent Solutions*
Steve Bodurtha, *Merrill Lynch*

2:30 – 3:00 pm **Refreshment Break with Exhibitors**

Breakout Sessions

3:00 – 3:45 pm

- 1 The Impact of the Evolving Regulatory Environment on Financial Advisors** Kevin Crain, *Merrill Lynch (Moderator)*
Chris Augelli, *ADP Retirement Services*
Catherine Miller, *Schwab Retirement Services*
 - 2 Participant Disclosure: SEC and DOL are considering changes. What's the Status and What's the Impact?** Dana Johnston, *eSolutions Sales & eBusiness Development*
Jeff Levering, *NewRiver, Inc.*
Francine Rosenberger, *K&L Gates*
 - 3 New Development in Employee Benefit Plans Financial Statement Auditing** Ian MacKay, *American Institute of Certified Public Accountants*
- 3:45 – 4:30 pm **The Pension Protection Act, Phase Two: The Impact on Sponsors, Participants and Providers** Heidi Walsh, *T. Rowe Price Retirement Plan Services*
- 4:30 – 6:45 pm **Cocktail Reception with Exhibitors**

Tuesday - June 10

7:30 – 8:00 am **Continental Breakfast with Exhibitors**

8:00 – 9:00 am **Key IRS Guidance:
Outlook for 2008 and 2009** Tom Schendt, *Alston & Bird (Moderator)*
Rhonda Migdail, *Internal Revenue Service*
Martin Pippins, *Internal Revenue Service*

9:00 – 10:00 am **Not Your Father's 403(b)!** Larry Goldbrum, *The SPARK Institute (Moderator)*
Bob Architect, *Internal Revenue Service*
Marilyn Collister, *Great-West Retirement Services*

10:00 – 10:30 am **Break**

10:30 – 11:30 am **Plan Fees: An Update on Litigation,
Legislation and Regulatory Issues** Patrick DiCarlo, *Alston & Bird*
Tom Schendt, *Alston & Bird*
Carolyn E. Smith, *Alston & Bird*
Michele Varnhagen, *House Committee on Education & Labor*

11:30 – 12:30 pm **Legislative Update** Bill Sweetnam, *Groom Law Group*

12:30 pm **Conference Adjourns**