RETIREMENT PLAN TRENDS: KEY ISSUES FACING PLAN SPONSORS TODAY

AGENDA

Wednesday, November 16, 2005

7:30-8:15	**Registration and Breakfast**

7:30-8:15	**Opening Remarks**

***Matt Gnabasik*, Managing Director   Blue Prairie Group**

8:30-9:30	**Fiduciary Best Practices for Plan Committees**

***Don Trone*, President   Center for Fiduciary Studies**

Don Trone will discuss the responsibilities and best practices of plan investment committee members and how to establish a due diligent process that will help to protect plan investment committee members from unnecessary liability.

9:30-10:15	**A New Paradigm for Lowering Plan Costs**

***Matt Gnabasik*, Managing Director   Blue Prairie Group**

A retirement plan's assets usually grows more quickly than the cost to provide core recordkeeping services. Historically, this "excess" revenue generated by the growth of the plan has been kept by the recordkeeper. By knowing the cost structure of the plan and knowing exactly how much the provider is receiving in revenue sharing fees from the investments selected, the plan sponsor can negotiate a pricing contract that will return the excess revenue back to the plan. Matt Gnabasik will walk plan sponsors through the process of understanding total plan costs and show them how to use this information to drive down plan costs.

10:15-10:30	**Break**

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10:30-11:15	**DOL Audit Process Overview**

Steve Haugen, **Department of Labor**

Steven Haugen of the Department of Labor will discuss how the DOL approaches a plan audit and what they typically look for. This will help plan sponsors prepare in the case of a DOL audit and better yet, will provide steps sponsors can take today to avoid an audit in the first place.

11:15-12:00	**Changes in Non-qualified Plan Regulations**

Mike Melbinger, **Capital Partner   Winston & Strawn, LLP**

The American Jobs Creation Act of 2004 will dramatically affect any non-qualified deferred compensation arrangements your company may have in place. Mike Melbinger of Winston & Strawn LLP will discuss these changes and what actions a company must take to comply with the new regulations.

12:00-1:00	**Roundtable/Panel Discussion over Lunch**

Marla J. Kreindler, **Partner   Winston & Strawn, LLP**

Marla Kreindler will lead an open forum panel discussion of DB and DC plan sponsors. The panel will be talking about their approach to outsourcing, innovative plan design techniques such as automatic deferral and automatic savings increases, employee education, pending legislative changes, etc. This forum provides an excellent opportunity to hear what your peers are doing.

1:00-2:00	**Update on Pending Defined Benefit Legislation**

Sanford E. Koeppel, **VP, Legislative and Regulatory Affairs**
Prudential Retirement

Learn from a Washington insider what the pending legislative changes will mean for Defined Contribution and Defined Benefit plan sponsors alike.

2:00-3:00	**Total Retirement Outsourcing and Investment Strategies in DB Plans**

Matt Gnabasik, **Managing Director   Blue Prairie Group**

Gary Silverman, **Chief Investment Officer   Blue Prairie Group**

Gene A. Goldman, **Vice President & Consulting Actuary**
Prudential Retirement

With more and more DB plans terminating, Matt Gnabasik and Gene Goldman, an experienced actuary, will discuss a strategic framework for evaluating your plan as well as simple steps sponsors can take to reduce costs, increase services and achieve greater administrative efficiency. Gary Silverman will discuss the importance of portfolio investment design; specifically, the creation of a DB-specific portfolio designed to meet current and future liabilities.

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