

## Pre-Conference Agenda

### MONDAY August 2, 2010 (Pre-Conference Event)

12:00 p.m.	<b><u>ECFC Board Meeting</u></b>
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### TUESDAY August 3, 2010 (Pre-Conference Event)




7:00 am – 12:00 pm	<b><u>ECFC Board Meeting</u></b>
12:00 p.m.	<b><u>Second Annual Foundation for Future Leadership Golf Tournament</u></b> This year’s golf tournament will be held at the beautiful, picturesque and prestigious Torrey Pines Golf Course set alongside the Pacific Ocean.  <b><u>Separate registration required</u></b>

### WEDNESDAY, August 4, 2010 (Pre-Conference Event)

9:00 a.m.	<b><u>Decision Makers’ Meeting</u></b>  <b><u>Separate registration required</u></b>  <u>Current Agenda:</u> <ul style="list-style-type: none"><li>• Where is Washington DC on Healthcare reform...lobbying and legislative update</li><li>• ECFC Board committee updates<ul style="list-style-type: none"><li>▪ Results of member survey</li></ul></li><li>• ECFC Ahead. Ready and moving forward as an organization.</li><li>• Your ECFC: Input and feedback from you!</li></ul>
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## Agenda (Day 1)











### WEDNESDAY, August 4, 2010 (Conference Begins)







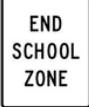



<b>11:00 a.m.</b>	<p><b>Conference Registration Begins</b> (Exhibit Hall Opens) Conference Lunch in Exhibit Hall</p>
<b>1:00 p.m.</b>	<p><b>Welcome and Introduction</b> • <i>Jody L. Dietel, CFCI, Chief Compliance Officer, WageWorks, Inc. and ECFC Conference Chair</i></p>
<b>1:15 p.m.</b>	<p><b>State of ECFC</b> How far has ECFC progressed in the last year, and what is on the horizon for the upcoming 12 months • <i>Dennis Triplett, Chairman, ECFC Board of Directors</i> • <i>David Carver, CFCI, Executive Director, ECFC</i></p>
<b>1:30 p.m.</b>	<p><b>Key Note Address: Sandra Maas, KUSI News Anchor</b></p> <p>Sandra Maas is the co-host of Good Morning San Diego which airs weekdays from 5-9. An award-winning journalist, Sandra joined the KUSI news team in 2004. Sandra will discuss health reform and how difficult reporting on this monumental legislation has been.</p> <p>2 CE Credits</p>
<b>2:45 p.m.</b>	<p><b>Refreshment Break in Exhibit Hall</b></p>
<b>3:00 p.m.</b>	<p><b>Lobbying Update</b></p> <div style="display: flex; align-items: flex-start;">  <p>Mehlman, Vogel, Castagnetti explain the logistics and behind-the-scenes workings of Congress and what’s on the horizon now that healthcare reform has passed. Gain insight into what is now happening in Washington DC that may ultimately impact your products and businesses.</p> </div> <p>• Colette Desmarais, Mehlman, Vogel, Castagnetti</p> <p>2 CE Credits</p>
<b>3:45 p.m.</b>	<p><b>On the Road Again Despite Major Highway Construction: A Critical Look at The Year in Review and the Road Ahead</b></p> <div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">  </div> <p>A deep dive on how PPACA, HIPAA HITECH, and other developments affect FSAs, HRAs, HSAs, and their administrators and custodians. When it all seems clear be sure to check your blindside.</p> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 10px;"> <ul style="list-style-type: none"> <li>• John Hickman, Esq., CFCI, Alston &amp; Bird LLP</li> <li>• Ashley Gillihan, Esq., Alston &amp; Bird LLP</li> </ul>  </div> <p>2 CE Credits</p>
<b>6:30 p.m.</b>	<p><b>ECFC All Attendee Reception in the Outdoor Palm Court</b> An evening of Tropical magic. A great opportunity to meet your peers and network with others to find out how they are navigating their organizations through the new Health Care landscape!</p>
<b>7:30 p.m.</b>	<p><b>Dinner &amp; Live Entertainment Music in the Glass Walled Pavilion</b></p>

## Agenda (Day 2)

**THURSDAY, August 5, 2010**




	Fundamental 8	Health Reform Construction Zone	Technical GPS
7:00 a.m.	<b>Continental Breakfast In Reception Hall</b>		
8:00 a.m.	<p><b>Legal Requirements</b>   This session provides a “teach to the test” approach for understanding the legal requirements for cafeteria plans.</p> <ul style="list-style-type: none"> <li>• <i>Cindy L. Davis, Esq., CFCI, Anderson, Helgen, Davis &amp; Nissen, LLC</i></li> </ul> <p>1 CE Credit</p>	<p><b>Road work ahead: 8 years! Health reform: long term challenges</b>                      Is it time to exit the HC benefits world and the tax or devote more energy?</p> <ul style="list-style-type: none"> <li>• <i>John W. Bagley, FSA, MAAA, Principal, Hewitt Associates</i></li> </ul> <p style="text-align: center;"></p> <p>1 CE Credit</p>	<p><b>State Laws and the TPA</b>                      TPA licensing, bonding, flex mandates...how do you keep up? Is it just in your state, or where you have clients? Or, is it wherever there are participants?</p> <ul style="list-style-type: none"> <li>• <i>Roger Abramson, J.D., SPHR, AmeriFlex</i></li> </ul> <p style="text-align: center;"></p> <p>1 CE Credit</p>
9:00 a.m.	<p><b>Documentation and Filing Requirements</b>   This session provides a “teach to the test” approach for understanding the documentation and filing requirements for cafeteria plans.</p> <ul style="list-style-type: none"> <li>• <i>Sandy Gleason, CFCI, MHM Resources LLC</i></li> </ul> <p>1 CE Credit</p>	<p><b>To Wrap or Not to Wrap</b></p> <ul style="list-style-type: none"> <li>• <i>Aimee Nash, Wolters Kluwer Law &amp; Business</i></li> </ul> <p style="text-align: center;"></p> <p>1 CE Credit</p>	<p><b>Detour: Voluntary benefits and alternate revenue streams</b></p> <ul style="list-style-type: none"> <li>• <i>Dan Johnson, Vice President of National Sales Trustmark Voluntary Benefits Solutions.</i></li> </ul> <p style="text-align: center;"></p> <p>1 CE Credit</p>
10:00 a.m.	<b>Refreshment Break in Exhibit Hall</b>		

	Fundamental 8	Health Reform Construction Zone	Technical GPS
10:15 a.m.	<p><b>Plan Discrimination</b></p>  <p>This session provides a “teach to the test” approach for understanding the nondiscrimination tests required for cafeteria plans and their components.</p> <ul style="list-style-type: none"> <li>• Mark Stember, Esq., CFCI, Kilpatrick Stockton</li> <li>• Robert M. Richter, J.D., LL.M., CFCI, SunGard Relius</li> </ul> <p>1 CE Credit</p>	<p><b>How FSAs and HRAs Work with HSAs: Designing a Plan for Employers</b></p> <ul style="list-style-type: none"> <li>• Jan LeTourneau, CFCI, MHM Resources LLC</li> <li>• Jody L. Dietel, CFCI, WageWorks, Inc. and SIGIS Association President</li> </ul>  <p>1 CE Credit</p>	<p><b>Slippery When Wet: MSP CMS Reporting</b></p> <ul style="list-style-type: none"> <li>• Ashley Gillihan, Esq., Alston &amp; Bird</li> </ul>  <p>1 CE Credit</p>
11:15 a.m.	<p><b>Flexible Spending Accounts</b></p>  <p>This session provides a “teach to the test” approach for understanding the basics of Flexible Spending Accounts.</p> <ul style="list-style-type: none"> <li>• Ron Jerzak, CFCI, Paychex, Inc.</li> </ul> <p>1 CE Credit</p>	<p><b>A look down the road at real reform: Wellness &amp; Health Status Improvements</b></p> <ul style="list-style-type: none"> <li>• Mark Stember Esq., CFCI, Kilpatrick Stockton</li> <li>• Martha Sewell Esq., Kilpatrick Stockton</li> </ul>  <p>1 CE Credit</p>	<p><b>To Trust or Not to Trust</b> FSA and COBRA trust and funding requirements. When do general assets become plan assets?</p> <ul style="list-style-type: none"> <li>• Ashley Gillihan, Esq., Alston &amp; Bird LLP</li> <li>• Dan Brandenburg, Esq., Saul Ewing LLP</li> </ul>  <p>1 CE Credit</p>
12:15 p.m.	<b>Luncheon in the Exhibit Hall</b>		
1:30 p.m.	<p><b>Claims Management and Payment Cards</b></p>  <p>This session provides a “teach to the test” approach for understanding eligible expenses and the use of debit cards for flexible spending accounts.</p> <ul style="list-style-type: none"> <li>• Teresa Cutler, CFCI, Employee Benefits Corporation</li> </ul>  <p>1 CE Credit</p>	<p><b>SIMPLE Cafeteria Plans Made Easy</b></p> <ul style="list-style-type: none"> <li>• Susan Monkmeyer, Esq., Thomson Reuters</li> </ul>  <p>1 CE Credit</p>	<p><b>Nondiscrimination: Advanced Applications</b> What can you do to apply creative design and still pass the tests? This session shows you how.</p> <ul style="list-style-type: none"> <li>• Mark Stember, Esq., CFCI, Kilpatrick Stockton</li> <li>• Robert M. Richter, J.D., LL.M., CFCI, SunGard Relius</li> </ul>  <p>1 CE Credit</p>

<p>2:30 p.m.</p>	<p><b>HIPAA/COBRA</b></p>  <p>This session provides a “teach to the test” approach for understanding COBRA and HIPAA requirements applicable to Healthcare Spending Accounts and HRAs.</p> <ul style="list-style-type: none"> <li>• <i>Connie Gilchrest, CFCI, Infinisource, Inc.</i></li> </ul> <p>1 CE Credit</p>	<p><b>Construction Ahead: What’s the future for FSAs?</b></p> <ul style="list-style-type: none"> <li>• <i>Darcy Hitesman, Esq., Hitesman and Associates P.A.</i></li> </ul>  <p>1 CE Credit</p>	<p><b>HIPAA HITECH</b></p> <p>Covered entity obligations for Business Associates. What happened to the good old days?</p> <ul style="list-style-type: none"> <li>• <i>Kathryn Bakich, SEGAL</i></li> </ul>  <p>1 CE Credit</p>
<p>3:30 p.m. Refreshment Break in Exhibit Hall</p>			
<p>3:45 p.m.</p>	<p><b>Transit &amp; Parking Plans</b></p>  <p>This session provides a “teach to the test” approach for understanding Transit and Parking Accounts, the 1% rule and transit passes.</p> <ul style="list-style-type: none"> <li>• <i>Dan Corbett, CFCI, WageWorks, Inc.</i></li> </ul> <p>1 CE Credit</p>	<p><b>OTC – Caution Speed Bumps</b></p> <ul style="list-style-type: none"> <li>• <i>Jody L. Dietel, CFCI, WageWorks, Inc. &amp; SIGIS Association President</i></li> <li>• <i>John Hickman, Esq., CFCI, Alston &amp; Bird</i></li> </ul>  <p>1 CE Credit</p>	<p><b>Red Flags Rule/Identity Theft</b></p> <ul style="list-style-type: none"> <li>• <i>Cheryl Risley Hughes, Esq., Groom Law Group</i></li> </ul>  <p>1 CE Credits</p>
<p>4:45 p.m.</p>	<p><b>Consumer Driven Healthcare (HRAs and HSAs)</b></p>  <p>This session provides a “teach to the test” approach for understanding Consumer Driven Healthcare, HDHPs and the use of HSAs and HRAs.</p> <ul style="list-style-type: none"> <li>• <i>Sue Sieger, CFCI, Benefits Design Group, Inc.</i></li> </ul>  <p>1 CE Credit</p>	<p><b>Does the snake survive? COBRA in a health reform world...</b></p> <ul style="list-style-type: none"> <li>• <i>Kris Saunders, CFCI, SPHR WageWorks, Inc.</i></li> </ul>  <p>1 CE Credits</p>	<p><b>Fines Double in a construction zone: GINA, Michelle’s Law, State Laws The Electronic Age</b></p> <ul style="list-style-type: none"> <li>• <i>Cheryl Risley Hughes, Esq., Groom Law Group</i></li> </ul>  <p>1 CE Credit</p>
<p>6:00 p.m. Free Evening Dine Around Restaurant Reservations Available</p>			

## Agenda (Day 3)

**Friday, August 6, 2010**

<b>7:30 a.m.</b>	<b>Continental Breakfast in Exhibit Hall</b>	
<b>8:30 a.m.</b>	<p><b>Regulatory Update and a Deep Dive on Difficult FSA Expenses: The IRS Answers the Tough Questions on Section 21 and Section 213 Eligibility</b></p> <ul style="list-style-type: none"> <li>• <i>Donna M. Crisalli, Office of the Associate Chief counsel – Income Tax &amp; Accounting, Internal Revenue Service</i></li> <li>• <i>Kevin Knopf, Benefits Tax Counsel, U.S. Department of the Treasury</i></li> </ul> <div style="text-align: center;">  </div> <p style="text-align: center;">2 CE Credits</p>	
<b>9:45 a.m.</b>	<b>Refreshment Break in Exhibit Hall</b>	
<b>10:45 a.m.</b>	<p><b>Putting it All Together and planning your route for the future</b></p> <ul style="list-style-type: none"> <li>• <i>Technical Advisory Committee (John Hickman, Esq., CFCI, Chairperson)</i></li> </ul> <div style="text-align: center;">  </div> <p style="text-align: center;">2 CE Credits</p>	<p><b>FCS and CFC Study Session ECFC Educational Committee</b></p> <ul style="list-style-type: none"> <li>• <i>Jan LeTourneau, CFCI, ECFC Educational Committee Chairperson</i></li> </ul> <div style="text-align: right;">  </div> <p style="text-align: center;">2 CE Credits</p>
<b>Noon</b>	<b>Conference Concludes</b>	
<b>1:00 p.m. – 4:00 p.m.</b>	<p><b>FCS and CFC Proctored Exams</b> <b>Separate registration required</b></p>	