2008 PLAN DESIGNS

DC Designs for Changing Times

June 18–20, 2008 | The Fairmont Hotel | Chicago, IL

Day 1—Wednesday 6/18

3:00 - 3:15

Opening remarks *(International Ballroom)*
Charlie Ruffel, CEO, PLANSPONSOR

3:15 - 4:15

What the 2008 Election Means for Your Benefit Plans *(International Ballroom)*
Nevin Adams, *Editor-In-Chief*, PLANSPONSOR/PLANSPONSOR.COM

4:15 - 4:30

Coffee Break sponsored by ACS *(International Ballroom)*

4:30 - 5:30

Hot Topics/Top Fiduciary Concerns
One of last year's most popular sessions! Company stock...investment advice...the lack of an investment policy statement...404c...What's keeping YOU up at night? The top fiduciary challenges confronting plan sponsors today—and what you can do about them.

MODERATOR

Nevin Adams, *Editor-In-Chief*, PLANSPONSOR/PLANSPONSOR.COM

PANELIST

Michael Barry, *President,* Plan Advisory Services Group

Mark Davis, *Partner*, Kravitz Davis Sansone

Fred Reish, *Managing Director*, Reish Luftman Reicher & Cohen

5:40 - 7:00

Getting to Know You—Cocktails and Hors d'oeuvres sponsored by AXA
Exhibit Hall Opens (Imperial Ballroom)

7:00

Walk About Dining in Exhibit Space
(Exhibit Hall—Imperial Ballroom)

Sponsorship info: Foster Wright | 203.595.3280 | fwright@plansponsor.com
General info: Carol Popkins | 203.595.3282 | cpopkins@plansponsor.com

Agenda subject to change.

2008 PLAN DESIGNS

DC Designs for Changing Times

June 18–20, 2008 | The Fairmont Hotel | Chicago, IL

Day 2—Thursday 6/19

6:30 - 8:00

Breakfast sponsored by Northern Trust
Exhibit Hall (Imperial Ballroom)

8:00 - 8:15

Opening Remarks— *(International Ballroom)*

8:15 - 9:10

TRACK 1

Meaningful Comparisons
How to benchmark your programs.

MODERATOR

Fred A. Schneyer, *Senior Editor,* PLANSPONSOR

PANELIST

Barbara Best, *VP Investments, Capital Strategies Group,* Wachovia Securities

Tom Kmak, *Principal,* Fiduciary Benchmarks, Inc.

Michael Kozemchak, *Managing Director,* Institutional Investment Consulting/An NRP Member Firm

TRACK 2

QDIA
What the regulations on qualified default investment alternatives mean for your plan—and when.

MODERATOR

Alison Cooke, *Managing Editor,* PLANADVISER

PANELIST

Tony Ciocca, *Managing Director,* Institutional Investment Consulting/ An NRP Member Firm

Christina Stauffer, *VP,* PIMCO

James Daley, *VP Head of Asset Allocation,* Diversified Investment Advisors, Inc.

TRACK 3

The End in Mind
Helping participants save for retirement is only half the battle. How you can—and should—help them choose the right retirement Income solution.

MODERATOR

Erik Vander Kolk, *Group Publisher,* PLANSPONSOR

PANELIST

Rebecca Ades, *VP, Institutional Sales,* AXA Equitable

Rob Kieckhefer, *Financial Consultant,* RBC Wealth Management

James Lyday, *Senior VP, Distribution,* Prudential Retirement

Matt Smith, *Managing Director, Retirement Services,* Russell Investments

9:15 - 10:10

What IS an ERISA Account?
ERISA accounts, sometimes referred to as ERISA "budgets," have gained increased prominence in recent months as part of a renewed focus on 401(k) plan fees and expenses. But it seems fair to say that the opportunities behind the concept have only just begun to be fully exploited.

MODERATOR

Alison Cooke, *Managing Editor,* PLANADVISER

PANELIST

Jason K. Bortz, *Partner,* Davis & Harman LLP

Barbara Delaney, *Principal,* Stone Street Equity, Inc.

Peter Swisher, *VP and Senior Institutional Consultant,* Unified Trust Company, NA

Multiple Choice
Target date, risk-based, managed accounts—which one is right for your plan—and why.

MODERATOR

Fred A. Schneyer, *Senior Editor,* PLANSPONSOR

PANELIST

Jim Danaher, *Senior Product Manager, Defined Contribution Solutions,* Northern Trust

Chris Herman, *VP, Director of Retirement Solutions,* Old Mutual

Christopher Jones, *Chief Investment Officer,* Financial Engines

Todd Lacey, *Managing Director,* (k)larity Group

Duty Bound
Best practices for plan fiduciaries.

MODERATOR

Nevin Adams, *Editor-In-Chief,* PLANSPONSOR/PLANSPONSOR.com

PANELIST

Michael DiCenso, *National Practice Leader/President,* Gallagher Retirement Services

Fred Reish, *Managing Director,* Reish Luftman Reicher & Cohen

Jim O'Shaughnessy, *Managing Partner,* Sheridan Road

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Day 2—Thursday 6/19 continued

10:15 - 10:45 **Coffee Break sponsored by ACS** *(Exhibit Hall—Imperial Ballroom)*

10:45 - 11:45 **Guest Speaker** *(International Ballroom)*
Rob Portman, *former Director of the Office of Management and Budget, US Trade Representative, and Congressman*

12:00 - 1:30 **Lunch sponsored by PIMCO/Allianz** *(Exhibit Hall—Imperial Ballroom)*

1:45 - 2:45

TRACK 1

Actions Oriented
Innovative ways to motivate participants (large).

MODERATOR

Nevin Adams, *Editor-In-Chief,* PLANSPONSOR/ PLANSPONSOR.com

PANELIST

Karen Barnes, *Managing Counsel,* McDonald's Corporation

Anne McKillips, *Managing Director,* The McKillips Group, LLC

John Mott, *SVP Investments Corp Client Group Director,* Smith Barney

Heidi Walsh, *VP and Director of Consultant and Advisor Relations,* T. Rowe Price

TRACK 2

Actions Oriented
Innovative ways to motivate participants (small).

MODERATOR

Alison Cooke, *Managing Editor,* PLANADVISER

PANELIST

Janet Ganong, *Consultant,* RBC Dain Wealth Management

Stace A. Hilbrant, *Managing Director,* 401(k) Advisors, LLC

Cheryl D. Orr, *Assistant Director, Human Resources,* Fairfax County Government

2:45 - 3:15 **Coffee Break sponsored by ACS** *(Exhibit Hall—International Ballroom)*

3:15 - 4:10

TRACK 1

Stable, Valued?
Capital preservation funds may not have made the list of "long-term" solutions under the final QDIA regulations, but they remain a popular default choice for many plan sponsors, and remain an important asset class overall. What the new generation of stable value choices could bring to your program—and what the next generation has in store.

MODERATOR

Foster Wright, *SVP,* PLANSPONSOR

PANELIST

Steven Horner, *SVP & Portfolio Manager,* Putnam Investments

Mark Woolhiser, *Principal,* MBC Investment Consulting, Inc.

TRACK 2

409A: The Aftermath
Deferred compensation programs have undergone significant change in the past two years—what plan sponsors have done—and should have done.

MODERATOR

Fred A. Schneyer, *Senior Editor,* PLANSPONSOR

PANELIST

Jason Chepenik, *Managing Partner,* Chepenik Financial

Jim Clary, *President,* MullinTBG

John Smith, *VP,* Merrill Lynch

Kenneth A. Dayton, *Regional Director,* The Newport Group

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Day 2—Thursday 6/19 continued

4:15 - 5:15

Reasonable "Doubts"
How to figure out if your fees/services are "reasonable" (large plans).

MODERATOR

Charlie Ruffel, *CEO,* PLANSPONSOR

PANELIST

Jennifer Flodin, *COO & Co-Founder,* Plan Sponsor Advisors

Michael Olah, *Field VP, ERISA Services,* Charles Schwab

Pat Schmidt, *Sr. Analyst, Compensation and Benefits,* JTEKT North America

Marina L. Edwards, *Sr. Consultant,* Towers Perrin

Reasonable "Doubts"
How to figure out if your fees/services are "reasonable" (small plans).

MODERATOR

Nevin Adams, *Editor-In-Chief*, PLANSPONSOR/ PLANSPONSOR.com

PANELIST

John Low, *Regional VP,* Nationwide Financial

Gail K. Anderson, *Director of Finance,* Bell Boyd & Lloyd LLP

Ron Eisen, *Principal,* Fiduciary Benchmarks, Inc.

5:30 - 7:30

Cocktail Party sponsored by Merrill Lynch *(Moulin Rouge Room)*

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Day 3—Friday 6/20

6:30 - 8:15 — **Breakfast sponsored by Dow Jones Indexes** *(Exhibit Hall—Imperial Ballroom)*

8:30 - 8:40 — **Opening Remarks** *(International Ballroom)*

8:45 - 9:40

TRACK 1

Build or Buy
There is a new level of customization coming to asset allocation solutions—managed accounts built from the options that exist on your existing retirement plan menu. How does this approach stack up with more traditional asset allocation funds? Is this a better deal for participants?

MODERATOR:

Charlie Ruffel, *CEO,* PLANSPONSOR

PANELIST:

Robert Boyda, *SVP Investment Management Services,* John Hancock

Michael Case Smith, *Member, Board of Advisors,* Avatar Associates

Stuart Odell, *Director, Retirement Investments,* Intel Corporation

TRACK 2

Inside or Out?
Should your Retirement Income solution be offered inside your DC plan—or as a rollover solution? The pros and cons of each approach.

MODERATOR:

Erik Vander Kolk, *Group Publisher,* PLANSPONSOR

PANELIST:

Brian Birmingham, *VP, Business Development,* AXA Equitable

James Lyday, *Senior VP, Distribution,* Prudential Retirement

Theresa "Tess" Malone, *Consultant,* Blue Prairie Group

Tom Pittman, *Chief Marketing Officer,* The Newport Group

9:45 - 10:40

TRACK 1

Suit Yourself
Bullet-proofing your retirement plan.

MODERATOR:

Alison Cooke, *Managing Editor,* PLANADVISER

PANELIST:

Keith Gredys, *CEO & COO,* Kidder Benefit Consultants, Inc.

Nancy Ross, *Partner,* McDermott, Will & Emery

Thom Shumosic, *President,* Rockwood Financial Group

TRACK 2

"Tell" Tales
Participant notice requirements—what you have to tell them—when, how, and why.

MODERATOR

Fred A. Schneyer, *Senior Editor,* PLANSPONSOR

PANELIST

Robert J. Higgins, *Consulting Manager,* Benefit Plans Plus

Melanie Walker, JD, *VP,* The Segal Company

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Day 3—Friday 6/20 continued

10:40 - 11:00	**Coffee Break sponsored by ACS** *(Outside meeting rooms)*	
	TRACK 1	TRACK 2
11:00 - 11:50	**See "Saw"** How new fee disclosure requirements will affect your plan. **MODERATOR:** **Fred A. Schneyer,** *Senior Editor,* PLANSPONSOR **PANELIST:** **Mary Ann Langevin,** *DC Business Leader,* Mercer **Stephanie Napier,** *VP & Senior Trust Counsel,* Marshall & Ilsley Trust Company **Douglas Prince,** *Managing Director,* Stifel Nicolaus	**Qualified "Success"** Benchmarking asset allocation solutions. **MODERATOR:** **Charlie Ruffel,** *CEO,* PLANSPONSOR **PANELIST:** **Jeb Graham,** *Retirement Plan Consultant,* CapTrust **Kamila Kowalke,** *Business Development Director,* Dow Jones **Joe Nagengast,** *Principal,* Target Date Analytics LLC
12:00 noon	**Buffet Lunch & Final Exhibit Hall** *(Imperial Ballroom)*	