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PROGRAM

Thursday, September 6, 2007
8:00 a.m. Registration and Continental Breakfast
9:00 a.m. Introductory Remarks
9:05 a.m. 403(b) Update, Including Final Regulations (if Issued) — Messrs. Architect, Miller, and Powell
10:45 a.m. Networking Break
11:00 a.m. Rollovers, Inherited IRAs, and Other Portability Issues — Mss. Cowart, Hoffman, and Hutzelman
12:00 noon Questions and Answers
12:30 p.m. Lunch Break
2:00 p.m. Church Plans Update — Messrs. Miller and Powell
2:45 p.m. Governmental Plans Update — Mss. Calhoun and Mumford and Mr. Nixon
3:45 p.m. Networking Break
4:00 p.m. Welfare Benefits Update — Mss. Cowart and Watson and Mr. Weinheimer
5:15 p.m. Questions and Answers
5:45 p.m. Adjournment for the Day

Friday, September 7, 2007
8:00 a.m. Continental Breakfast
9:00 a.m. Other Deferred Compensation and Severance Arrangements: Guidance under §409A and §457(f) — Messrs. Hogans and Laing and Ms. Press
10:15 a.m. Networking Break
10:30 a.m. Current Issues for 401(k) and Other Defined Contribution Plans after the Pension Protection Act — Messrs. Laing and Nixon and Ms. Mumford
12:00 noon Questions and Answers
12:30 p.m. Lunch Break
2:00 p.m. Current Issues for Defined Benefit Plans after the Pension Protection Act, Including Cash Balance Plans — Messrs. Godofsky, Mason, and Weller
3:30 p.m. Networking Break
3:45 p.m. DOL Update — Mss. Rees and Watson
4:45 p.m. Questions and Answers
5:15 p.m. Adjournment for the Day
Saturday, September 8, 2007
8:00 a.m.   Continental Breakfast
8:30 a.m.   IRS Update: Employee Plans — Mr. Pippins
9:00 a.m.   Treasury Update: Benefits Tax Counsel — Mr. Reeder
9:30 a.m.   Questions and Answers
10:00 a.m.  Networking Break
10:15 a.m.  Legislation Update — Mr. O'Neill
10:45 a.m.  Questions and Answers
11:00 a.m.  IRS Benefits Litigation — Mr. Roach
11:30 a.m.  DOL Benefits Litigation — Mr. Scott
12:00 noon Questions and Answers
12:30 p.m.  Adjournment
ALI-ABA Course of Study
Retirement, Deferred Compensation, and Welfare Plans
of Tax-Exempt and Governmental Employers

September 6 - 8, 2007
Washington, D.C.

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DEMUTUALIZATIONS: AN OVERVIEW OF WELFARE BENEFIT PLAN ISSUES, BNA
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Author), The Pension Actuary (September 1998); Worker Classification and
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Public Pension Fund Raids – The Modern Shell Game, EMPLOYEE BENEFITS
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