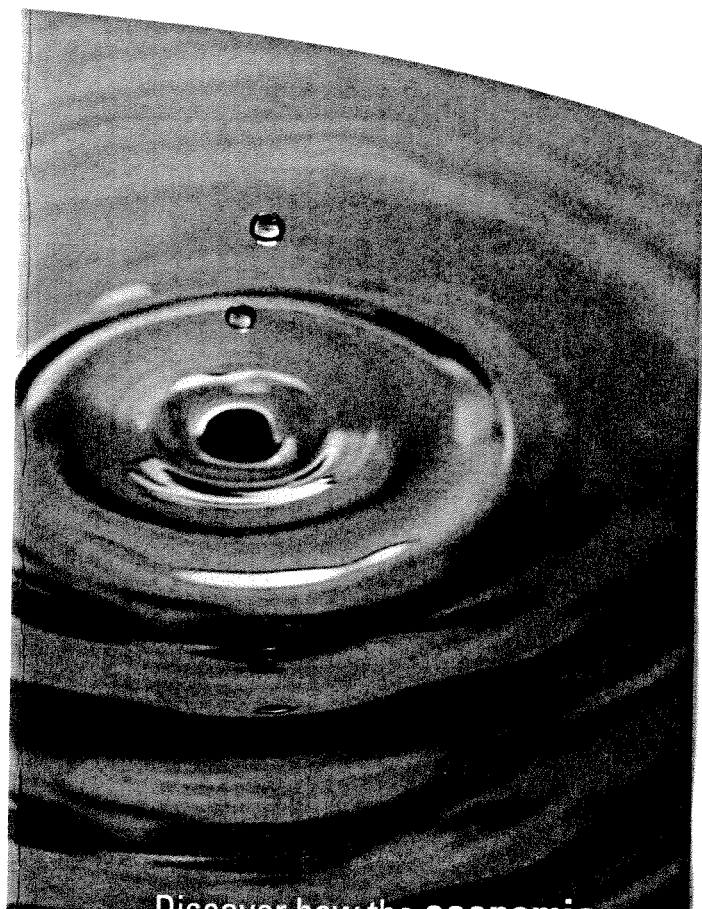
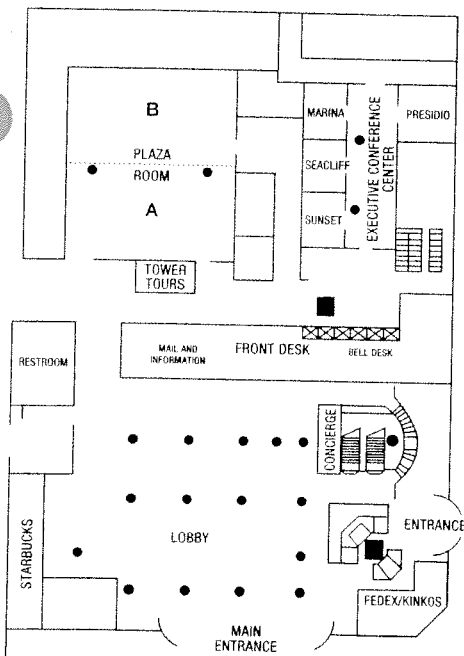
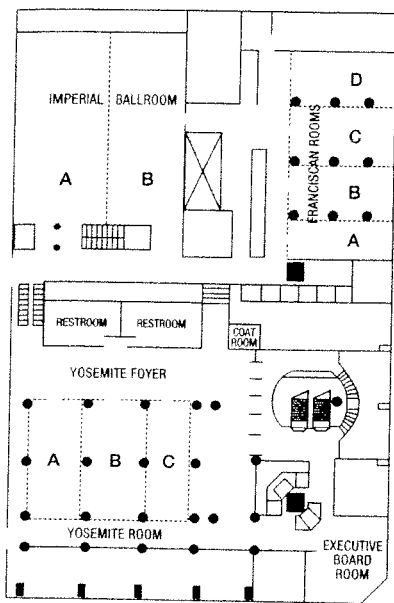


Program at a Glance

Trustees and Administrators Institutes

June 24-26, 2013

Hilton San Francisco Union Square
San Francisco, California



Discover how the **economic,**
political and **regulatory**
environment impacts your **plans.**

International Foundation
OF EMPLOYEE BENEFIT PLANS 
Education | Research | Leadership

Sunday, June 23, 2013

4:00-6:00 p.m.
4:00-6:00 p.m.
4:00-6:00 p.m.

REGISTRATION
EXHIBIT HALL OPEN
WELCOME RECEPTION

East Lounge
Golden Gate
Golden Gate

Monday, June 24, 2013

6:30 a.m.-4:30 p.m.
6:30-7:30 a.m.
11:45 a.m.-1:15 p.m.
4:00-5:00 p.m.

REGISTRATION
CONTINENTAL BREAKFAST
LUNCH/EXHIBIT HALL OPEN
NETWORKING RECEPTION

East Lounge
Golden Gate
Golden Gate
Golden Gate

ADVANCED TRUSTEES

7:30-8:45 a.m. Continental Ballroom 5-6
Opening Session: Economic Update
(Joint Session with Administrators)
Speaker: Brian L. Beaulieu

9:00-10:15 a.m.

Continental Ballroom 5-6
Will Tait-Hartley Plans Survive the Affordable Care Act? **① ②**
(Joint Session with Administrators)
Speakers: Randy G. DeFrehn
John E. Slatery, CEBS

10:30-11:45 a.m.

Continental Ballroom 7-9
Recruiting the Next Generation of Trustees
Speakers: Michael J. Cook
William A. Martin
David C. Semerad

1:15-2:30 p.m.

Continental Ballroom 7-9
Withdrawal Liability **① ②**
Speaker: Elizabeth E. Marzo, Esq.

2:45-4:00 p.m.

Continental Ballroom 5-6
The Future of the Pension Protection Act **① ②**
Speaker: Mary Ann Dunleavy

Continental Ballroom 7-9
Delinquencies **①**
Speaker: Travis J. Ketterman

ADMINISTRATORS

7:30-8:45 a.m. Continental Ballroom 5-6
Opening Session: Economic Update
(Joint Session with Advanced Trustees)
Speaker: Brian L. Beaulieu

9:00-10:15 a.m.

Continental Ballroom 2-3
Self-Service Participant Communications **①**
Speaker: Christopher E. Beecht

10:30-11:45 a.m.

Continental Ballroom 2-3
Will Tait-Hartley Plans Survive the Affordable Care Act? **① ②**
(Joint Session with Advanced Trustees)
Speakers: Randy G. DeFrehn
John E. Slatery, CEBS

1:15-2:30 p.m.

Continental Ballroom 5-6
Health Care Update **① ②**
(Joint Session with Advanced Trustees)
Speaker: Sharon M. Goodman

2:45-4:00 p.m.

Continental Ballroom 2-3
Surviving a DOL or IRS Audit **① ②**
Speakers: David Evangelista
James W. Versocki

NEW TRUSTEES

7:30 a.m.-12:00 noon Continental Ballroom 4
Trustees' Responsibility **①**
Speaker: Peter M. Rosene

1:15-3:15 p.m.

Continental Ballroom 4
Overview of Health and Welfare Funds **① ②**
Speaker: Jackson A. Loos

3:30-4:30 p.m.

Continental Ballroom 4
Current Issues in Health and Welfare **① ②**
Speaker: Jackson A. Loos

Tuesday, June 25, 2013

6:30 a.m.-4:00 p.m.
6:30-7:30 a.m.
11:15 a.m.-1:15 p.m.

REGISTRATION
CONTINENTAL BREAKFAST
LUNCH/EXHIBIT HALL OPEN

East Lounge
Golden Gate
Golden Gate

ADVANCED TRUSTEES


7:30-8:45 a.m.

Legal and Fiduciary Update 

Speaker: Neal S. Scheiberg



Continental Ballroom 5-6

9:00-10:15 a.m.

Making Realistic Plan Assumptions 

Speakers: Jay K. Egelberg
James K. Estabrook, Esq.

Continental Ballroom 7-9

Health Insurance Exchanges  
(Joint Session with Administrators)
Speaker: Cindy Gillespie

10:30-11:45 a.m.

Dealing With Ethical Issues   *(ethics)*

Speaker: Andrew E. Staab


Continental Ballroom 5-6

1:15-2:30 p.m.

Understanding Alternative Investments



Speakers: Jeffrey S. Endick
David Evangelista

Continental Ballroom 5-6

Value-Based Health Care Panel Discussion 
(Joint Session with Administrators)

Speakers: Lewis E. Devendorf
Andrea D. Goldberger
Margaret C. Lemkin, Ph.D.

Continental Ballroom 7-9

Retirement Security Panel Discussion  
(Joint Session with Administrators)

Speakers: Cassandra R. Cole, Ph.D.
R. Scott Gregory
Andrew E. Staab

Continental Ballroom 2-3

2:45-4:00 p.m.

Infrastructure Investing

Speaker: Glenn Eard

Continental Ballroom 5-6

Value-Based Health Care Followup Workshop 

(Joint Session with Administrators)
Speaker: Andrea D. Goldberger

Continental Ballroom 7-9


Patient-Centered Medical Home 

(Joint Session with Administrators)
Speaker: John D. Sprandio, M.D.

Continental Ballroom 2-3

ADMINISTRATORS



7:30-8:45 a.m.

Update on Government Reporting and Disclosure 

Speakers: Paula D. Alphin
Rachel R. Parisi, CEBS

Continental Ballroom 2-3

9:00-10:15 a.m.

Health Insurance Exchanges  
(Joint Session with Advanced Trustees)

Speaker: Cindy Gillespie

Continental Ballroom 5-6

10:30-11:45 a.m.

Effective Staff Training and Development

Speaker: Moira J. Kelly

Continental Ballroom 2-3

1:15-2:30 p.m.

Value-Based Health Care Panel Discussion 
(Joint Session with Advanced Trustees)

Speakers: Lewis E. Devendorf
Andrea D. Goldberger
Margaret C. Lemkin, Ph.D.


Continental Ballroom 7-9

Retirement Security Panel Discussion  
(Joint Session with Advanced Trustees)

Speakers: Cassandra R. Cole, Ph.D.
R. Scott Gregory
Andrew E. Staab


Continental Ballroom 2-3

2:45-4:00 p.m.

Value-Based Health Care Followup Workshop 

(Joint Session with Advanced Trustees)
Speaker: Andrea D. Goldberger

Continental Ballroom 7-9


Patient-Centered Medical Home 

(Joint Session with Advanced Trustees)
Speaker: John D. Sprandio, M.D.

Continental Ballroom 2-3

NEW TRUSTEES


7:30-9:30 a.m.

Overview of Pension Funds 

Speaker: R. Scott Gregory

Continental Ballroom 4

9:45-11:45 a.m.

Current Issues in Pensions 

Speaker: R. Scott Gregory

Continental Ballroom 4

1:00-4:00 p.m.

Investing Health and Welfare and Pension Assets

Speaker: Sandy Lincoln

Continental Ballroom 4

6:30-11:45 a.m.
6:30-7:30 a.m.

Wednesday, June 26, 2013

REGISTRATION
CONTINENTAL BREAKFAST

East Lounge
Golden Gate

ADVANCED TRUSTEES

7:30-8:45 a.m.

Mental Health in the Workplace **①** **②** Continental Ballroom 5-6
(Joint Session with Administrators)

Speaker: Bill Wilkerson

9:00-10:15 a.m.

Continental Ballroom 5-6

The Latest in DB/DC/Hybrid Plans **①** **②**

Speakers: Mary Ann Dunneavy
Jay K. Egelberg

Medicare Part D Prescription Program Options **①** **②**

(Joint Session with Administrators)
Speaker: Ronald W. Laudel

10:30-11:45 a.m.

Continental Ballroom 9

Effectively Managing Your Apprenticeship and Training Fund **①**

Speaker: James W. Versocki

Construction Industry Roundtable

Speakers: Michael J. Cook
James K. Estabrook, Esq.

ADMINISTRATORS

7:30-8:45 a.m.

Mental Health in the Workplace **①** **②** Continental Ballroom 5-6
(Joint Session with Advanced Trustees)

Speaker: Bill Wilkerson

9:00-10:15 a.m.

Continental Ballroom 2-3

Electronic Administration: From Board Meetings to the Back Office

Speaker: Michael E. Davis, CEBS

Medicare Part D Prescription Program Options **①** **②**

(Joint Session with Advanced Trustees)
Speaker: Ronald W. Laudel

10:30-11:45 a.m.

Continental Ballroom 2-3

Administrators' Open Forum

Speakers: Paula D. Alphin
Christopher E. Brecht

NEW TRUSTEES

7:30-9:15 a.m.

Understanding the Fund's Financial Statements **①**

Speaker: Lawrence R. Beebe

Continental Ballroom 4

9:30-11:30 a.m.

Continental Ballroom 4

Trust Fund Administration **①**

Speakers: Matthew Winkler
Corey J. Wirth, CEBS

Continuing Education Credit—Submit one yellow CE form | **①** Attorney CLE **②** Insurance CE | Note: CE for other professions can be administered based on submission of yellow forms.

Plan Now to Attend

2014 Trustees and Administrators Institutes

February 17-19, 2014

Preconference—February 16

Disney's Yacht and Beach Club Resorts
Lake Buena Vista (Orlando), Florida

June 23-25, 2014

Preconference—June 22

The Cosmopolitan of Las Vegas
Las Vegas, Nevada