

Trials & Trends ©

Objective: This half day course is offered as a stand-alone program, or as part of a full-day course, when combined with ***The Fiduciary Summit***. This course provides participants with an overview of recent federal legislation and highlights court decisions affecting the qualification and administration of employee benefit plans. Participants will learn about recent trends affecting the design and operation of total reward compensation structures, volume submitter, prototype, and individually-designed benefit plans.

What you will learn:

- Current themes and outcomes in federal benefits litigation
- Recent legislative updates, including the COBRA subsidy, mental health parity laws, MRD waivers and suspensions, and multi-employer plans funding status look-backs
- Recent regulatory updates, including overviews of proposed and final regulations on automatic contribution arrangements, service provider fee disclosures, cafeteria plan qualification, 403(b) plan document transitions, and 409A compliance
- Recent developments in plan design and administration
- An overview of the evolution of deferred compensation plans, identifying the transitions between defined benefit, defined contribution, and hybrid/cash balance retirement plans

CPE: 4 Hours

Level: Basic

Category: Tax - Employee Benefits

Prerequisites: None

Instructor: Jason Sheffield