

Indiana Chamber of Commerce
Employee Benefits Seminar
June 12, 2019

Presented by



- 8:30 a.m. **Registration and Continental Breakfast**
- 9:00 a.m. **Welcome and Introductions**
Jennifer George, Director, Business Education and Events, Indiana Chamber and Stephanie Smithey, Shareholder, Ogletree Deakins
- 9:15 a.m. **Voluntary Exit Incentive Programs**
Stephanie Smithey
- 10:15 a.m. **Break**
- 10:30 a.m. **Health and Welfare Hot Topics**
 - ACA enforcement update
 - Revisiting wellness plan limits
 - Cross-plan offsetting
 - Transgender coverage
 - Telemedicine and telemental health*Stephanie Smithey and Maggie Hayes, Associate*
- 11:15 a.m. **Qualified Plan Game Changers**
 - New rules for hardship distributions
 - Pension mortality table improvements
 - Lump sum windows
 - Student loan repayment options*Cathie Reese, Shareholder*
- 12:00 p.m. **Lunch (Provided)**
- 1:00 p.m. **Using Meaningful Benefits Due Diligence to Further Your M&A Goals**
 - Questions to ask before you begin
 - Diligence checklists
 - Identifying and resolving pitfalls and deal-breakers*Kevin Burch, Of Counsel*
- 1:45 p.m. **401(k) Tips, Tricks and Tools**
 - Plan design ideas
 - Finding and fixing failures
 - Avoiding transaction turmoil
 - Vendor coordination*Elizabeth O’Gara, Of Counsel*

- 2:15 p.m. **Break**
- 2:30 p.m. **Déjà Vu All Over Again: What You Need to Know About the DOL's Proposed Overtime Changes**
Steve Pockrass, Shareholder
- 3:00 p.m. **Protecting Your Plans from Liability**
- Statute of limitations
 - Arbitration clauses
 - Class action waivers
 - Anti-assignment provisions
- Maggie Hayes*
- 3:30 p.m. **COBRA and Medicare: Navigating the Murky Waters**
Stephanie Smithy
- 4:00 p.m. **Questions and Answers**
- 4:15 p.m. **Adjourn**