
CAPITAL FORUM ON PENSIONS 2024

THURSDAY, JUNE 6, 2024

Agenda

- 7:30 am to 8:15 am** Continental Breakfast / Check in
- 8:15 am to 8:30 am** Introductions
- 8:30 am to 10:00 am** KEYNOTE: **S. DERRIN WATSON**
- 10:00 am to 10:15 am** *Break – Door prizes at sponsor tables*
- 10:15 am to 12:00 pm** More with Keynote Speaker, **S. Derrin Watson**
- 12:00 pm to 1:00 pm** *Break for lunch*
- 1:00 pm to 2:40 pm** WP&BC's WIDE WORLD OF CORRECTIONS
*With speakers: **Scott E. Galbreath**, Equity and Executive Compensation Practice Team leader at Trucker Huss, and **Marcel Weiland**, Shareholder at Employee Benefits Law Group*
- 2:40 pm to 2:55 pm** *Break – Door prizes at sponsor tables!*
- 2:55 pm to 3:45 pm** BREAKOUT SESSIONS (pick one or the other):
- PENSION LITIGATION UPDATE
*With Speakers: **Angel Garrett**, Trucker Huss, and **Kirsten Scott**, Renaker Scott*
- PLAN AUDIT SURPRISES
*With **Crystal Coleman**, CLA*
- 3:45 pm to 4:00 pm** *Break – Door prizes at sponsor tables!*
- 4:00 pm to 5:00 pm** ASK THE EXPERTS PANEL, and
ERISA birthday party – cake and sparkling cider reception
*With panel: S. Derrin Watson; Crystal Coleman;
Scott Galbreath; Marcel Weiland; Angel Garrett; and Kirsten Scott*

**Details about sessions and workshops are provided on the back of this page.*



Session and Workshop Details

GENERAL LEGISLATIVE UPDATE | S. Derrin Watson

In the 50 years since the passage of ERISA, US retirement plans have seen profound changes, with many of the most dramatic changes coming in the last four years. Keep up to date with our keynote speaker, S. Derrin Watson. Topics include:

- Design and testing strategies for LTPT Employees
- DOL's 4th attempt to redefine investment advice fiduciary
- Upcoming interim amendments and restatements
- Kicking the RMD can down the road yet again
- Mandatory automatic enrollment in 2025
- Recent guidance on SECURE 2.0
- Recent changes to Form 5500
- Roth employer contributions
- And more!

WP&BC's WIDE WORLD OF CORRECTIONS | Scott E. Galbreath, Trucker Huss & Marcel Weiland, Employee Benefits Law Group

Join legendary broadcasters Howard Goselfcorrect and Ep Curs as they span the globe to bring you the wide world of plan correction programs and techniques from self-correction to VCP to Voluntary Closing Agreements to Audit Closing Agreements. The presentation will have a particular emphasis on SECURE 2.0's new self-correction of eligible inadvertent failures. Case studies will illustrate application of correction programs to facts.

PENSION LITIGATION UPDATE | Kirsten Scott, Renaker Scott & Angel Garrett, Trucker Huss

During this presentation, experienced employee benefit attorneys will provide an update on hot topics in pension litigation, including recent litigation trends in cases addressing pension risk transfers, cybersecurity issues, ESG funds, and pension benefit misstatements. The panelists will include both a defense-side attorney that routinely advises and litigates on behalf of plan sponsors, as well as a plaintiff-side attorney that regularly litigates on behalf of employees and retirees in employee benefit matters.

PLAN AUDIT SURPRISES | Crystal Coleman, CLA

In this session, you will hear about the recent changes in the Form 5500 and how some Plans may no longer require an annual audit (yes, it is true!). With all the recent recordkeeper consolidations, increasing use of automation/integration between plan recordkeeping platforms and payroll software and fallout from COVID and the Great Resignation, there have been more plan audit surprises. These required additional time, energy and resources to correct and in some cases, required significant plan sponsor contributions to correct errors spanning multiple years. Come hear real world audit stories about what went wrong, how it was detected, the approach for correction and what to look for, spot check, etc. to make sure you avoid such situations.

DC & DB: ASK THE EXPERTS PANEL

S. Derrin Watson, Scott E. Galbreath, Marcel Weiland, Crystal Coleman, Kirsten Scott, and Angel Garrett will be present to answer questions and discuss current events.

A BIRTHDAY PARTY FOR ERISA

Join us as we celebrate 50 years of ERISA with cake and sparkling cider!