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## ACCUDRAFT'S UPCOMING EDUCAST SCHEDULE\*

### How to Showcase your Firm's Value through Service Agreements

Wednesday, June 29, 2011 - 2:00 p.m. – 3:00 p.m. Eastern Time  
<https://tlr.webex.com/tlr/k2/j.php?ED=147960562&UID=1167216932&HMAC=2948169fbc4d06b53ab2a871d9870a2413a86c50&RT=MIMxMQ%3D%3D&FM=1>

### Administrative Policies – Using them for Maximum Flexibility

Wednesday, July 13, 2011 – 2:00 p.m. – 3:00 p.m. Eastern Time  
<https://tlr.webex.com/tlr/k2/j.php?ED=147961992&UID=1167219247&HMAC=95010984e81315d68976fb9c453a743fe99ab110&RT=MIMxMQ%3D%3D&FM=1>

### Dispelling the Confusion of Government Plans vs Private Sector Plans

Thursday, July 21, 2011 – 2:00 p.m. – 3:00 p.m. Eastern Time  
<https://tlr.webex.com/tlr/k2/j.php?ED=147962777&UID=1167223352&HMAC=58d08f60700e6d54492e8a14a4e580c9b5e5a9b6&RT=MIMxMQ%3D%3D&FM=1>

### Best Practices and Practical Guidance on Prevailing Wage Plans

Wednesday, August 3, 2011 – 2:00 p.m. – 3:00 p.m. Eastern Time  
<https://tlr.webex.com/tlr/k2/j.php?ED=147964187&UID=1167228937&HMAC=f4acb290ea983c9906ac6122877f666af29441e1&RT=MIMxMQ%3D%3D&FM=1>

### Recent Trends in Multiple Employer Plans and what they mean for your Firm

Wednesday, August 10, 2011 – 2:00 p.m. – 3:00 p.m. Eastern Time  
<https://tlr.webex.com/tlr/k2/j.php?ED=147964242&UID=1167231307&HMAC=d2c5e163d163f5690fb6cb21c211d46a8a1ceb3c&RT=MIMxMQ%3D%3D&FM=1>

### Safe Harbor Plans – Revisiting the Rules

Wednesday, August 17, 2011 – 2:00 p.m. – 3:00 p.m. Eastern Time  
<https://tlr.webex.com/tlr/k2/j.php?ED=147964717&UID=1167231507&HMAC=b4e0ac1600c19c69809bbb79ff53a6d8bd1ec229&RT=MIMxMQ%3D%3D&FM=1>

\*Each 1-hour session worth 1 ASPPA CPE

### How to Showcase your Firm's Value through Service Agreements

Wednesday, June 29, 2011 - 2:00 p.m. – 3:00 p.m.  
Eastern Time

**CONTACT:** email either Kevin or Dawn today for your registration link!  
[Kevin.m.watson@thomsonreuters.com](mailto:Kevin.m.watson@thomsonreuters.com)  
[dawn.frappollo@thomsonreuters.com](mailto:dawn.frappollo@thomsonreuters.com)

Defining the role of each party involved in the operation and administration of a qualified plan is essential. A well written, comprehensive Service Agreement becomes more important than ever because of the new reporting and disclosure rules related to direct and indirect plan expenses.

Unrelated to compliance considerations, a Service Agreement provides an opportunity to define your Firm's role and liabilities, showcase your value and make sure that your Firms is adequately compensated for your services. It is also a vehicle to define the Plan Sponsor's ongoing responsibilities that cannot be delegated to a 3rd party.

This EduCast will focus on the importance of a Service Agreement, the collection of information in a manner that will aid in required fee disclosures, best practices and pricing models as well as automate the process of creating Service Agreements.

Speaker: Amy Cavanaugh, Thomson Reuters-AccuDraft - 1 ASPPA CPE

### Administrative Policies – Using them for Maximum Flexibility

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One of the defining features of the AccuDraft documents is the fact that we established Administrative Policies to be used by the ERISA Plan Administrator as well as 3rd Party Administrators to operate the Plan.

The information included in Administrative Policies includes aspects of the operation of the Plan that are not mandated to be included in the document itself. By including these types of information in Administrative Policies as opposed to in the Plan Document, it

creates a level of flexibility to coordinate with the parameters of the administration system and internal policies as to prevent operational defects in instances where the language in the Administrative Policies conflicts with the actual operation of the Plan.

This EduCast will focus on the components of an Administrative Policy and how an Administrative Policy differs from a Plan Amendment or Appendix.

Speaker: Amy Cavanaugh, Thomson Reuters-AccuDraft - 1 ASPPA CPE

### **Dispelling the Confusion of Government Plans vs Private Sector Plans**

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Governmental Plans are not subject to many of the requirements that apply to private sector plans. In recent years, more and more governmental entities are shifting to a defined contribution benefit model.

This EduCast will discuss the differences between governmental plans and private sector plans as well as special design considerations due to the nature of governmental employment arrangements, document alternatives and marketing opportunities.

Speaker: Amy Cavanaugh, Thomson Reuters-AccuDraft - 1 ASPPA CPE

### **Best Practices and Practical Guidance on Prevailing Wage Plans**

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The recent federal government stimulus program has increased the number of prevailing wage employment arrangements.

It is common for Employers bidding on Prevailing Wage contracts to discharge the fringe benefit component of the prevailing wage hourly rate requirement through a defined contribution plan as to maximize its value to both the employer and the employee.

This EduCast will include a discussion of the rules specific to prevailing wage plans, some administrative pratfalls, plan design and best practices.

Speaker: Amy Cavanaugh, Thomson Reuters-AccuDraft - 1 ASPPA CPE

### **Recent Trends in Multiple Employer Plans and what they mean for your Firm**

Wednesday, August 10, 2011 – 2:00 p.m. – 3:00 p.m. Eastern Time

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Historically Multiple Employer Plans were maintained by Associations or PEOs however there is a recent trend in TPA's maintaining Multiple Employer Plans in order to offer attractive pricing and more favorable investment options as well as structure the Plan in a manner that limits liability and streamlines administration.

This EduCast will discuss the rules under which these plans operate, the evolution of the TPA Multiple Employer Plans, structuring and pricing Multiple Employer offerings and assignment of liability amongst the Plan Sponsor, Adopting Employers and outside providers.

Speaker: Amy Cavanaugh, Thomson Reuters-AccuDraft - 1 ASPPA CPE

### **Safe Harbor Plans – Revisiting the Rules**

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While most of us are familiar with the general requirements of Safe Harbor Plans as well as the options with respect to Plan design, it is always a good idea to revisit the rules and alternatives each year prior to the distribution of the required Safe Harbor Notices.

This session will look at Safe Harbor Plans as far as plan design alternatives, best practices, notice requirements and delivery alternatives and communicating the value and obligations of a Plan Sponsor who offers their Employees a Safe Harbor 401(k) Plan.

We will also compare the Automatic Contribution QACA to a traditional Safe Harbor Plan design.

Speaker: Amy Cavanaugh, Thomson Reuters-AccuDraft - 1 ASPPA CPE

#### **About the Speaker:**

Amy Cavanaugh is a qualified retirement plan and employee benefit consultant with over 30 years of experience with respect to plan design, documentation and best practices. She is a frequent public speaker on retirement plan issues and the author of many articles on retirement plan issues. Areas of expertise include prevailing wage plans, Puerto Rico retirement plan issues, service agreements and plan design.

Amy authored the Coverage and Nondiscrimination Answer Book until 2006 and has been active in industry associations such as ASPPA and NIPA. Amy lives in Palm Beach, FL, she is a graduate of Jacksonville University and the Institute for Paralegal Training ERISA Program and serves on the Board of Governors of Jacksonville University.

