



Office of
Continuing
Education

Department of Conference Management and
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News Release

FOR IMMEDIATE RELEASE

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26th Annual Creative Pension & Benefits Seminar Targets Professionals

COLUMBUS, Ohio, March 1 — On Friday, May 2, 2008, from 8:30 a.m. – 4:15 p.m., The Ohio State University Office of Continuing Education (CEd) hosts the 26th annual **Creative Pension & Benefits Seminar**, a one-day professional development conference, at the Fawcett Conference Center, 2400 Olentangy River Road.

The seminar provides attorneys, accountants, financial consultants, life insurance underwriters, actuaries, bank trust officers, human resource managers, and others interested in tax, estate, and personal financial planning with background and factual information on the latest trends in qualified plan design and recent dramatic legislative changes to better serve their clients.

Creative Pension & Benefits participants also earn Continuing Education Units (CEUs) and Continuing Legal Education (CLE) that varies in amount depending on discipline. The Ohio Supreme Court Commission approves 6.25 CLE, and the Ohio Department of Insurance approves the program for 7 credits whereas The Accountancy Board of Ohio, the American Society of Pension Actuaries, and the Certified Financial Planning Board of Standards have approved this conference for 7 hours of CEUs.

Creative Pension & Benefits topics include: Recent Developments for Qualified Plans and Employee Benefits, Including Regulatory Guidance Under PPA and Future Direction of Pension Reform; Responsibilities of Qualified Plan Fiduciaries, Including Fee Disclosures; 401(k) Testing — Recent Developments and Issues, Including Safe Harbor Designs and Automatic Enrollment; Automatic Enrollment and QDIAs — Choosing Among the Options; Basics of Cross-testing for Defined Contribution Plans, Including 401(k) Issues; Plan Document Updates — EGTRRA and Beyond; Mechanics of Qualified Plan Distributions — How the Rules Have Changed in Terms of Beneficiaries, the Required Forms, and Applicable Timelines; 403(b) Deadlines and Regulatory Changes; and 409A Deferred Compensation Issues and the Final Regulations, Including a Rundown on the Actions Required to Be Taken for 2008.

Comprised of Rita K. Edwards (43215); Theresa Finneran (43215); Jill R. Kooker (43271); Sarah Sieling (43210); Elbert R. Nester, JD (43220); Scott A. Stewart (43016); John Terakedis, JD (43215); and Andrew J. Treece (43215); the Seminar Planning Committee selected leaders for their everyday working knowledge and experience in setting up employee benefits plans for businesses in various sections of the United States. The program speakers have backgrounds in law, insurance, investments, or accounting.

Sieling, program manager for CEd's Department of Conference Management says, "This range of talent and experience makes this one of the best seminars available about pensions."

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For more information about the conference or to register online, visit ced.osu.edu or call the Office of Continuing Education at (614) 292-8571.

The Department of Conference Management in The Ohio State University Office of Continuing Education (CEd) specializes in providing meeting and conference management services — from pre-conference concept to post-conference follow-up — on a cost-effective basis to the university community as well as to private and public businesses and associations. For more information on CEd's Conference Management services, visit ced.osu.edu and click on "Conference Management," or contact Sarah Sieling in the Office of Continuing Education at (614) 292-8571.

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