
CAPITAL FORUM ON PENSIONS 2019

JUNE 5, 2019

Agenda

- 7:30 am to 8:00 am** Continental Breakfast/Check in
- 8:00 am to 8:15 am** Introductions
- 8:15 am to 10:00 am** **Keynote: STEPHEN FORBES, J.D.**
General Legislative Update on Tax Reform, IRS and DOL Developments
- 10:00 am to 10:15 am** *Break - Raffle prizes at sponsor tables!*
- 10:15 am to 11:50 am** Ethics Case Studies, and
Self-Correction: Surviving IRS Scrutiny
With Stephen Forbes, J.D.
- 12:00 pm to 1:00 pm** *Lunch on the Patio*
- 1:00 pm to 2:00 pm** CalSavers is Here...Are You Ready?
With a panel including Scott Galbreath, Employee benefits and executive compensation practice group leader at Murphy Austin, Aaron Karr, WPBC Board member, and investment advisor with Ameriprise, and Bill Sokol, Partner at Weinberg, Roger & Rosenfeld and original Board member of Secure Choice, representing CalSavers.
- 2:00 pm to 2:15 pm** *Break – Raffle prizes at sponsor tables!*
- 2:15 pm to 3:45 pm** The Tax Cuts and Jobs Act of 2017 – What does 199A Really Mean for Retirement Plans?
With Kevin Donovan, CPA, EA, FSPA, FCA
- 3:45 pm to 4:00 pm** *Break – Raffle prizes at sponsor tables!*
- 4:00 pm to 5:00 pm** DC & DB: Ask the Experts Panel
With:
Stephen Forbes, J.D.; Kevin Donovan, CPA, EA, FSPA, FCA;
Scott Galbreath, J.D., LL.M. (Tax); Aaron Karr, CRPS, APA, QKA

*Details about sessions and workshops are provided on the following pages.



Session and Workshop Details

GENERAL LEGISLATIVE UPDATE

Stephen Forbes, J.D.

Changes upcoming in the retirement arena. This live presentation keeps you informed on critical, up-to-the-minute information on our industry. Guidance on topics and updates on statutory, regulatory and legal decisions over the last 12 months will be covered, including the latest updates to the EPCRS program.

ETHICS CASE STUDIES

Stephen Forbes, J.D.

Stephen will do actual case studies to satisfy everyone's Ethics requirements for their specific CE requirements.

SELF-CORRECTION: SURVIVING IRS SCRUTINY

Stephen Forbes, J.D.

Hear firsthand how to deal with correcting the self-corrections correctly. Did we say correcting enough?

CALSAVERS IS HERE...ARE YOU READY?

Bill Sokol, Weinberg Roger & Rosenfeld

Aaron Karr, QPA, Ameriprise Platinum Financial Services

Scott E. Galbreath, J.D., L.L.M. (Tax), Murphy Austin Adams Schoenfeld, LLP

CalSavers is California's payroll deduction IRA-based retirement savings program. It is currently the law, and employers who don't offer their employees a retirement plan can register for the program beginning July 1, 2019. Employers with 100 or more employees who don't offer employees a different retirement plan are required to automatically enroll their employees by June 30, 2020 or face penalties. The deadline for compliance for employers with 50 or more employees is June 30, 2021 and the deadline is June 30, 2022 for employers with five or more employees. This session will include a panel of presenters that will discuss the history of the law (including the lawsuit challenging it); the details of CalSavers; and alternative plans that may be adopted by employers to be exempt from the program. The presentation will be followed by a Q&A session.



THE TAX CUTS AND JOBS ACT OF 2017 – WHAT DOES 199A REALLY MEAN TO RETIREMENT PLANS?

Kevin Donovan, CPA, EA, FSPA, FCA, Pinnacle Plan Design, LLC

The new Section 199A deduction for pass-through entities with “Qualified Business Income” (QBI) demands a closer look at the effectiveness of retirement plan contribution deductions. Businesses may find the effectiveness of their deduction unchanged, reduced suggesting use of Roth and after-tax contributions, or enhanced to greater than 100%!

DC & DB: ASK THE EXPERTS PANEL

Stephen Forbes, Kevin Donovan, Scott E. Galbreath, and Aaron Karr will be present to answer questions and discuss current events.

