



5.25.16

# CFOP - SACRAMENTO

## Annual Capital Forum on Pensions

The Capital Forum on Pensions provides an opportunity for Northern California retirement specialists to discuss employee benefits issues with colleagues. The program focuses on exchanging information and educating attendees about current regulatory, legislative, and administrative issues.

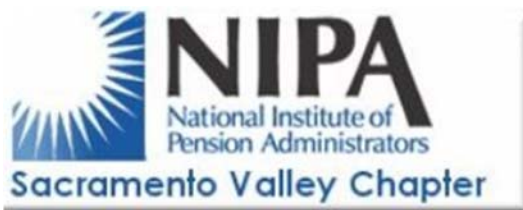
### Keynote Speaker – Sal Tripodi

We are also proud to present, Ilene H. Ferenczy of Ferenczy Benefits Law Center LLP, Beth Harrington of Benefit Resources, Inc., Kevin Thelen of Genovese Burford and Brothers, and ERISA attorneys Scott E. Galbreath of The Burton Law Firm, James Paul of Paul Benefits Law and Marcel Weiland of Chang, Ruthenberg and Long.

### Who should attend?

Accountants	Benefits Directors	Plan Administrators
Actuaries	Consultants	Plan Sponsors
Advisors	HR Personnel	Practitioners
Attorneys	Investment Professionals	Third Party Administrators

\*The conference will provide 7 hours of CE credit for AIF® and AIFA®, ASPPA, CFP, NIPA, ERPA, JBEA, MCLE AND CALIFORNIA & OREGON CPA.



## AGENDA - AT A GLANCE

7:30 am

Continental Breakfast/Check in

8:15 am

Welcome and Introductions

### MORNING SESSION

8:30am – 12:30 pm

Updates on IRS and DOL developments, Ethics, Mid-Year Safe Harbor amendments, Changes to Compliance testing and the Fiduciary Proposal

Lunch 12:30 pm – 1:30 pm

### GENERAL SESSION

1:30 pm – 2:30 pm

### The State of Retirement Plans

- How do we cover more people?
- Competition from State-run programs and MyRAs
- Changes to Social Security

### WORKSHOPS

2:45 pm – 3:45 pm

- Increasing Retirement Income with Courageous Leadership
- Cash Balance Plans
- Correcting Common and Not-So-Common Plan Failures

### FINAL GENERAL SESSION

#### DC & DB PANEL Q&A

4:00 p.m. - 5:00 p.m.

Arden Hills Resort  
1221 Arden Hills Lane,  
Sacramento, CA

### Need Hotel Reservations?

Want more info?  
Rebecca Giannini  
[info@wpbcsacramento.org](mailto:info@wpbcsacramento.org)

**REGISTER NOW!**