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Employee Benefits Institute

**Friday, April 24, 2009**  
**Overland Park Convention Center**  
**6000 College Blvd.**  
**Overland Park, Kansas**

- Providing meaningful benefits in a challenging economy
- Retirement opportunities for the baby boom generation
- Latest information regarding plan fees and disclosures
- Annual update regarding health care reform
- Mobilizing a global workforce
- Unraveling the Genetic Information Nondiscrimination Act
- Legislative update regarding benefit matters
- Employer panel discussing HRA/HSA implementation

CLE Credit: MO: 8.7 / KS pending • Missouri and Kansas  
Life and Health Insurance credit pending • CPE credit: 8.5

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### “Save the Date”

#### Workshop Reminder:

In addition to the April 24, 2009 full day seminar, EBI will be sponsoring two early morning workshops addressing:

#### **Best Practices for Plan Fiduciaries – March 4, 2009**

#### **A Practical Guide to Fixing Plan Defects Under the IRS Employee Plans Compliance Resolution System – May 28, 2009**

For information regarding these workshops and  
to register on line see:

**[www.employeebenefitsinstitute.com](http://www.employeebenefitsinstitute.com)**

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### Upcoming EBI Workshops

Wednesday, March 4, 2009:  
Best Practices for Plan Fiduciaries

Thursday May 28, 2009:  
IRS Employee Plans Compliance Resolution System (Rev. Proc.  
2008-50): A Practical Guide

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Learn more and register on line at:  
[www.employeebenefitsinstitute.com](http://www.employeebenefitsinstitute.com)

For information about credit other than continuing  
legal education, see our web site:  
[www.law.umkc.edu/cle](http://www.law.umkc.edu/cle)

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Please make check payable to Employee Benefits Institute and mail to: Continuing Legal Education, UMKC School of Law, 5100 Rockhill Road, Kansas City, MO 64110-2499. If you have any questions call our office at (816) 235-1648.

The 23rd Annual Employee Benefits Institute, Friday, April 24, 2009 at the Overland Park Convention Center. Enclosed is \$\_\_\_\_\_ for \_\_\_\_\_ registrations at \$225 each.

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Name (please print or type)

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e-mail (FAX and e-mail are optional - complete only if you wish to receive Fax or e-mail notification of upcoming seminars)

If paying by credit card, fill out the following information. Credit card registrations may be faxed to (816) 235-5414.

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Relay Missouri. 800-735-2966 (TT) 800-735-2466 (Voice).

No admission ticket or confirmation will be sent. Just pick up materials at the registration desk on the day of the program. Preregistration is encouraged. There is no penalty for walk-in enrollments.

ANNUAL INSTITUTE

**7:30 A.M.**      **REGISTRATION AND CONTINENTAL BREAKFAST**

**7:55 A.M.**      **ANNOUNCEMENTS AND PROGRAM OVERVIEW**

**8:00 A.M.**      **RETIREMENT OPPORTUNITIES FOR THE  
BABY BOOM GENERATION**

**Thomas Rowley**

*Van Kampen Investments* • LaGrange, Ill.

**8:55 A.M.**      **ANNUAL UPDATE REGARDING  
HEALTH CARE REFORM**

**Paul W. Dennett** • *American Benefits*

*Council* • Washington, D.C.

**9:50 A.M.**      **BREAK**

**10:05 A.M.**      **LATEST INFORMATION REGARDING PLAN FEES  
AND DISCLOSURES**

**Pamela P. Perdue** • *Of Counsel, Summers,  
Compton, Wells & Hamburg* • St. Louis, Mo.

**11:00 A.M.**      **MOBILIZING A GLOBAL WORKFORCE**

**Gardiner Hempel** • *Deloitte Tax LLP*

New York, NY

**11:55 A.M.**      **LUNCHEON (INCLUDED IN FEE)**

**12:25 P.M.**      **PROVIDING MEANINGFUL BENEFITS IN A  
CHALLENGING ECONOMY**

**Craig S. Hakkio** • *Federal Reserve Bank of  
Kansas City* • Kansas City, Mo.

**1:15 P.M.**      **LEGISLATIVE UPDATE REGARDING BENEFIT  
MATTERS**

**Brian H. Graff** • *ASPPA* • Arlington, Va.

**2:10 P.M.**

**BREAK / VENDOR SOCIAL**

**2:40 P.M.**

**UNRAVELING THE GENETIC INFORMATION  
NONDISCRIMINATION ACT**

**Tamara (Tami) M. Simon** • *Mercer*

*Washington Resource Group* • Washington,  
D.C.

**3:35 P.M.**

**EMPLOYER PANEL REGARDING HRA/HSAS  
IMPLEMENTATION**

**Jonna Harris** • *H&R Block* • Kansas City,  
Missouri

**Mike Heckman**

*Cerner Corporation* • North Kansas City, Mo.

**Sheila Hayter**

*Blue Scope Steel North America* • Kansas  
City, Mo.

**Tresia Franklin**

*Hallmark Cards, Inc.* • Kansas City, Mo.

**4:30 P.M.**

**VENDOR DRAWINGS AND CLOSING COMMENTS**

**4:35 P.M.**

**ADJOURN**

CPE Credit Information

Course level: update      Delivery method: Live lecture

Course Objectives: The student will gain an understanding of important developments in employee benefits.

No prerequisites and/or advance preparation

Recommended CPE credit: 8.5 hours

For more information regarding administrative policies such as complaint and refund, please contact our offices at 816-235-1648.

UMKC/CLE is registered with the National Association of State Boards of Accountancy

(NASBA) as a sponsor of continuing professional education on the National Registry of

CPE Sponsors. State boards of accountancy have final authority on the acceptance of indi-

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TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org).

**Cancellations & Refunds**

We understand that conflicts arise. Cancellations received 48 hours or more prior to the beginning of the program will be refunded. Alternatively, you may choose to receive a credit voucher for a future UMKC/CLE program. Late cancellations and "no shows" will receive program materials on request. Substitutions are always permitted.

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The Sheraton Overland Park Hotel has set aside a block of rooms for attendees at a discount rate of \$129 single or double. To receive this rate, reservations must be made by March 31, 2009. Call 866-837-4214 and be sure to mention the Employee Benefits Institute or UMKC.