



# 15th Annual Employee Benefits Update

**Program dates start September 6. Register today!**

**7 CLE**

# 15th Annual Employee Benefits Update

## Take stock of the latest updates

Ensuring employees are taken care of through robust benefit plans is a full-time job. Help your clients help their employees by getting your yearly update on the complex rules that regulate compensation and benefits.

Whether you're trying to make sense of the changing rules around Association Health Plans or employer-provided fringe benefits, the *15th Annual Employee Benefits Update* will cover a broad spectrum of issues that affect your practice.

## Who should attend:

- Employee benefits lawyers
- Health law attorneys
- Employment law practitioners
- Tax law attorneys
- Insurance law practitioners
- Business law attorneys
- In-house counsel
- General practitioners

## How you'll benefit:

- Receive an overview of hot topics in employee benefits practice
- Discuss the unknown future of Association Health Plans
- Get the latest updates in retirement plans and mental and behavioral health claims under group health policies
- See how Employee Stock Ownership Plans (ESOPs) can be used as an exit-planning option
- Learn what fringe benefits must be reported on W-2s
- Understand how benefit plans are impacted by disability, divorce, or death

**Register now!**

## Book Sale!

### Wisconsin Employment Law

Save 20% on *Wisconsin Employment Law*.\* It's the most comprehensive treatment of Wisconsin law governing private-sector, nonunion employment available. It presents the perspectives of both employee and employer advocates, and provides an invaluable combination of experience and knowledge for attorneys and human resource professionals.

Use **discount code CA2919** when you order online at wisbar.org or call (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the *Books UnBound*® version.

**Print Book:** #AK0046; 2,080+ pp.; 3 volumes; 7th ed. 2018-19  
**Member:** ~~\$219~~ \$175.20 | **Nonmember:** ~~\$269~~ \$215.20

**Books UnBound**® **Subscription:** #AE0046  
**Member:** ~~\$159~~ \$127.20 | **Nonmember:** ~~\$199~~ \$159.20

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## Additional Learning Opportunities

### CLE OnDemand

### 14th Annual Employee Benefits Update – 2018

Learn what the IRS, Balanced Budget Act, Tax Cuts and Jobs Act, and more mean for retirement plans. Receive an analysis of ERISA fundamentals. Look at emerging trends in benefit plans offering mental and behavioral health coverage. **7 CLE**

**CLE OnDemand Seminar:** #CA2783D; **Member:** \$249 | **Nonmember:** \$329

### COBRA in the Context of an Aging Workforce – 2018

Understand how COBRA works. Learn how COBRA coverage coordinates with Medicare and Social Security Disability insurance. Discover options for covering continuing medical coverage costs for retiring employees. **1 CLE**

**CLE OnDemand Seminar:** #CA2842D; **Member:** \$89 | **Nonmember:** \$139

### Books / Books UnBound

### Hiring and Firing in Wisconsin

Find a comprehensive overview of the WI statutes governing screening, hiring, and termination. This book discusses how federal laws impact the state's employment practices. It also covers discrimination in hiring, testing and screening, providing references, and more. **(Includes 2018-19 supplement.)**

**Print Book:** #AK0206; 304+ pp.; 6th ed. 2015-16; **Member:** \$89 | **Nonmember:** \$109

**Books UnBound**® **Subscription:** #AE0206; **Member:** \$159 | **Nonmember:** \$199

## Schedule

### 8:00 AM Registration

### 8:30 AM Retirement Plan Updates

- Changes to the IRS correction program under the Employee Plans Compliance Resolution System (EPCRS)
- Anticipated updates to the hardship distribution rules under proposed IRS regulations
- An update on plan document restatements  
*Steven E. Grieb*

### 9:20 AM Cybersecurity for Retirement Plans

- How have retirement plans been successfully targeted by cyber criminals?
- How should plan sponsors protect themselves, their plans, and plan participants?
- What should be done to manage security breaches?  
*Brian L. Anderson*

### 10:10 AM Break

### 10:25 AM Are You Taxing Your Fringes?

- The impact of the Tax Cuts and Jobs Act of 2017 on the tax treatment of some employer-provided fringe benefits
- Recent IRS ruling on employer-provided meals
- Fringe benefits that must be included on the W-2 (Say goodbye to that free lunch!)  
*Mary Ellen Schill*

### 11:15 AM Association Health Plans: Where Are We Now?

- “Old” DOL association rules
- “New” DOL association rules
- The court case that changed everything
- Dealing with AHPs going forward  
*David Eckhardt*

### 12:05 PM Lunch (on your own)

### 1:05 PM ESOPs as an Exit Planning Option

- Overview of ESOPs
- Traditional uses of an ESOP
- Is your company a candidate for an ESOP?
- Pros and cons of ESOPs  
*Rebecca E. Greene*

### 1:55 PM Developments in Mental and Behavioral Health Claims Under Group Health Policies

- Common mental and behavioral health coverage terms in group health policies
- Use of exterior “guidelines” developed in-house or through consultants
- Subjectivity in making coverage determinations
- Possible claims and the remedies available to participants  
*John B. Tuffnell*

### 2:45 PM Break

### 3:00 PM Death, Disability (and a Little Divorce) in Employee Benefits

- The legal rules regarding death and disability in various types of benefit plans
- Practical issues faced by employers in administering benefit plans when these life-changing events happen
- Court cases that highlight problems faced by plan administrators  
*Leigh C. Riley*

### 3:50 PM Program Concludes

*Following start time, webcast replay schedule will vary slightly from above listed times.*

## Dates

## Location

### LIVE SEMINAR:

Friday, September 6, 2019  
**Madison** – State Bar Center  
5302 Eastpark Blvd.  
(608) 257-3838

### LIVE WEBCAST:

Friday, September 6, 2019

### WEBCAST REPLAYS:

Wednesday, September 18, 2019  
Tuesday, September 24, 2019  
Thursday, October 3, 2019  
Friday, October 11, 2019  
Tuesday, October 15, 2019

## Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE credits**. It does not qualify for EPR credit.

## Faculty

### Program Chair

#### Michael W. Taibleson

Jackson Lewis, P.C.  
Milwaukee

### Presenters

#### Brian L. Anderson

DeWitt LLP  
Madison

#### David Eckhardt

Husch Blackwell LLP  
Milwaukee

#### Rebecca E. Greene

Reinhart Boerner Van Deuren, S.C.  
Milwaukee

#### Steven E. Grieb

Director of Regulatory Services  
Empower Retirement  
Milwaukee

#### Leigh C. Riley

Foley & Lardner LLP  
Milwaukee

#### Mary Ellen Schill

Ruder Ware, L.L.S.C.  
Wausau

#### John B. Tuffnell

Salberg Tuffnell Law, S.C.  
West Bend

# Registration

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**MAIL:** State Bar PINNACLE Registrations  
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## State Bar CLE/PINNACLE Passbook Registrations:

Passbook Certificates must be received by the State Bar at least one business day prior to the event. For live seminars, walk-in registrations with Passbook Certificates are welcome.

## Registration Cancellations:

Please visit [wisbar.org/cancellation\\_policy](http://wisbar.org/cancellation_policy) for information on PINNACLE registration cancellation policies.

## Course materials for those attending the seminar:

**Course materials are provided in PDF format** and are downloadable from myStateBar on wisbar.org up to four days prior to and 90 days after your seminar. For live seminar attendees who prefer a printed format, please select the tuition option that includes printed materials for an additional \$20.

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Priority Code: S 3 7 4 7 B

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## Seminar Date/Location:

- Live Seminar:** Friday, September 6, 2019 – Madison
- Live Webcast:** Friday, September 6, 2019
- Webcast Replay:** Wednesday, September 18, 2019
- Webcast Replay:** Tuesday, September 24, 2019
- Webcast Replay:** Thursday, October 3, 2019
- Webcast Replay:** Friday, October 11, 2019
- Webcast Replay:** Tuesday, October 15, 2019

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