



18th Annual Employee Benefits Update

Program dates start September 8. Register today!

7 CLE

18th Annual Employee Benefits Update

Reap the benefits

With a record number of job openings in the U.S. and not enough workers to fill them, many businesses are currently struggling to retain their top employees. Employers who aren't offering attractive employee benefit plans simply can't compete in today's job market.

Help your clients keep employees happy with your yearly update on the complex rules regulating compensation and benefits. The **18th Annual Employee Benefits Update** will deliver the information you need to keep your clients' benefit packages competitive.

How you'll benefit:

- Know the 15 provisions that should be in your Summary Plan Descriptions
- Help your clients attract, retain, and motivate their top employees
- Understand Wisconsin's Bone Marrow and Organ Donation Leave Act
- Examine equity compensation for pass-through entities
- Get the latest on retirement plan regulations and executive compensation litigation

Who should attend:

- Employee benefits lawyers
- Health law attorneys
- Labor & employment lawyers
- Insurance law practitioners
- Business lawyers
- In-house counsel
- General practitioners

Register now!

Registration

Online: www.wisbar.org/seminars

Phone: (800) 728-7788

Fax: (608) 257-5502

Mail: State Bar PINNACLE Registrations

P.O. Box 7158

Madison, WI 53707-7158

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 in-person seminars, walk-in registrations using Passbook Certificates are also welcome.

Registration Cancellations: Please visit wisbar.org/cancellations for information on PINNACLE registration cancellation policies.

Course materials: Course materials are provided to seminar registrants in PDF format and are downloadable from *myStateBar* on wisbar.org up to two days prior to and 90 days after your seminar.

COVID-19 Safety Information Attendees are asked to either be vaccinated or have a negative COVID-19 test administered within 48 hours of the event. Complete and current safety guidelines can be found at wisbar.org/covidsafety.

Book Sale!

Wisconsin Employment Law

SAVE 20% on *Wisconsin Employment Law*.* Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. *Wisconsin Employment Law* presents perspectives of both employee- and employer-side advocates, and it's packed with sample forms, notices, Department of Workforce Development policies, and more.

Use **discount code CA3310** when you order online at wisbar.org or call (800) 728-7788.

Print Book: #AK0046; 2,162+ pp.; 3 volumes; 7th ed. 2018-19
(Includes 2019-20 & 2020-21 supplements)

Member: ~~\$275~~ \$220 | **Nonmember:** ~~\$343.75~~ \$275

Books UnBound Subscription: #AE0046_SUB

Member: ~~\$270~~ \$216 | **Nonmember:** ~~\$337~~ \$269.60

*Discount applies to both print and digital Books UnBound editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of full library.



Schedule

8:00 AM Registration

8:30 AM ERISA Retirement Plan Regulatory Update

- DOL guidance regarding different investment types
- Keeping plan documents current
- Fiduciary liability insurance trends
- Status of state level retirement plans
Steven E. Grieb

9:20 AM 15 Provisions that Should Be in Your Summary Plan Descriptions (But Probably Aren't)

- Overview of the ERISA requirements for SPDs
- Which SPD provisions often get short shrift, but shouldn't
- Provisions that employers should consider including in their retirement or welfare plan summary plan descriptions, even though not legally required
- Recommendations from caselaw, government guidance and real-world examples of situations where SPD language would have been helpful
Leigh C. Riley

10:10 AM Break

10:25 AM Equity Compensation for Passthrough Entities

- A brief review of the various types of equity compensation, such as profits interests, capital interests, and phantom equity agreements
- The impact of vesting conditions tied to these awards
- The tax implications of the awards
- The economics of the awards
- LLC operating agreement implications
David Eckhardt

11:15 AM Executive Compensation Update

- Executive compensation litigation update
- IRS guidance update
- Dangerous deduction issues including
Hoops, L.P. v Commissioner
Martin P. Tierney

12:05 PM Lunch (on your own)

1:05 PM Annual ERISA Case Law Update

- U.S. Supreme Court clarifies pleading standards (and substantive duties) for claims against plan fiduciaries for offering allegedly "improper" investment options
- Selected Seventh Circuit decisions on retirement plan and life, health & disability claims
- Mental health parity in ERISA health plans
John B. Tuffnell

1:55 PM Break

2:10 PM Take It or Leave It: Wisconsin's Bone Marrow and Organ Donor Leave Law; Leave Donation Programs Done Right

- Which employers are required to provide donor leave?
- Defining donor leave
- Employee notice requirements to take advantage of donor leave
- Process for complaints regarding the donor leave law violations and how they are handled
- Donating paid leave in times of crisis, like the war in Ukraine
- Making sure your leave donation program complies with IRS rules
Mary Ellen Schill

3:00 PM Selected Current Issues Regarding Employee Benefits

- Mental health parity compliance
- Pooled employer plans and multiple employer plans
- Required minimum distribution rule changes
Brian L. Anderson

3:50 PM Program Concludes

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

Faculty

Program Chair

Michael W. Taibleson – Godfrey & Kahn, S.C., Milwaukee

Presenters

Brian L. Anderson – DeWitt LLP, Madison

David Eckhardt – Husch Blackwell LLP, Milwaukee

Steven E. Grieb – Arthur J. Gallagher & Co., Milwaukee

Leigh C. Riley – Foley & Lardner LLP, Milwaukee

Mary Ellen Schill – Ruder Ware L.L.S.C., Wausau

Martin P. Tierney – Michael Best & Friedrich LLP, Milwaukee

John B. Tuffnell – Salberg Tuffnell Law, S.C., West Bend

Dates

Location

In-Person Seminar – Madison

Thursday, September 8, 2022

State Bar Center

5302 Eastpark Blvd.

Madison, WI

(608) 257-3838

Live Webcast

Thursday, September 8, 2022

Webcast Replays

Friday, September 16, 2022

Tuesday, September 20, 2022

Monday, September 26, 2022

Wednesday, October 5, 2022

Tuesday, October 11, 2022

Friday, October 14, 2022

Thursday, October 20, 2022

Friday, November 25, 2022

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.

Additional Learning Opportunities

CLE Seminars

17th Annual Employee Benefits Update – 2021

Uncover developments on a broad range of issues, including changes to health, welfare and cafeteria plans, vaccine incentives, final 162(m) regulations, and the Mental Health Parity and Addiction Equity Act. Plus, explore the impact of the American Rescue Plan Act on employer-provided benefit plans. **7 CLE**

CLE OnDemand Seminar: #CA3142D; Member: \$269 | Nonmember: \$349

Books / Books UnBound

Employment Law Update 2022

Get sound guidance on remote workforce challenges like wage and hour issues, protecting company data, and workplace injuries. You'll also understand how to handle difficult disability accommodation requests, get a view from the bench from Judge William Conley, and receive your annual state and federal law updates. **7 CLE/1 EPR**

Madison Seminar and Live Webcast: Oct. 14, 2022

Webcast Replays: Oct. 25, 2022 | Oct. 31, 2022 | Nov. 4, 2022 | Nov. 10, 2022
Nov. 16, 2022 | Nov. 16, 2022 | Nov. 22, 2022 | Dec. 2, 2022
Dec. 8, 2022 | Dec. 17, 2022 | Dec. 28, 2022

Wisconsin Wages and Hours Handbook

The *Wisconsin Wages and Hours Handbook* is your trusted reference for issues including compensable work hours, calculating overtime, determining exempt vs. nonexempt employee status, and special rules for migrant and seasonal workers. You'll get detailed analyses of federal laws, along with the official text of Wisconsin's most commonly cited wage and hour laws. (Includes 2020-21 and 2021-22 supplements)

Print Book: #AK0210; 466+ pp.; 5th ed.; 2019-2020; Member: \$125 | Nonmember: \$156.25

Books UnBound® Subscription: #AE0210_SUB; Member: \$124 | Nonmember: \$155

This program is sponsored by:



18th Annual Employee Benefits Update

Priority Code: S 4 1 0 9 B

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$349
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Ultimate Pass Bronze	<input type="checkbox"/> \$239	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

IN-PERSON SEMINAR:

Thurs., Sept. 8, 2022 –
Madison

LIVE WEBCAST:

Thurs., Sept. 8, 2022

WEBCAST REPLAYS:

Fri., Sept. 16, 2022

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State Bar Passbook Certificate (enter certificate number) # _____

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NOTICE: By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

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