



# 19th Annual Employee Benefits Update

**Program dates start September 7. Register today!**

**7 CLE**

# 19th Annual Employee Benefits Update

**Endorsed by the Labor and Employment Law Section  
of the State Bar of Wisconsin**

## SECURE your spot today

The SECURE 2.0 Act has arrived, and it's crucial that you understand the many changes to enrollment, emergency savings, distribution events, and more. Get a comprehensive look at SECURE 2.0 and other recent developments in benefits, compensation, retirement, and taxation at the **19th Annual Employee Benefits Update**.

Experienced practitioners will help you ensure your clients are offering employees attractive (and error-free) plans. Don't miss this all-in-one update on the latest topics and trends in employee benefits.

## How you'll benefit:

- Know which contractual terms you should be negotiating for in benefit plans
- Enhance your understanding of recent changes to executive compensation
- Learn how to fix common retirement, health, and welfare plan errors
- Go in-depth on changes codified as SECURE 2.0 and what they mean for your clients
- Receive an update on class action fiduciary litigation under ERISA

## Who should attend:

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

There's lots of ground to cover, but the *19th Annual Employee Benefits Update* is jam-packed with insights, tips, and tricks to bring you up to speed quickly.

**Register now!**

## Book Bonus!

### Wisconsin Employment Law

Seminar attendees **save 15%** on Wisconsin Employment Law.\* It provides the most comprehensive coverage of Wisconsin law governing private-sector, nonunion employment from the perspective of both employee- and employer-side advocates.

\*Attendees will receive information to access the discount via email after attending the program. 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.



## Additional Learning Opportunities

### Employment Law Update 2023

Explore emerging issues in employment law surrounding the rise of artificial intelligence tools. Discuss recent updates from the National Labor Relations Board and hear vital insights on recent federal and Wisconsin case law. Plus, examine ethical matters relating to privilege for former officers, directors, managers, lower-level employees, and more. **7 CLE/1 EPR**

**Madison Seminar and Live Webcast:** Oct. 13, 2023

**Webcast Replays:** Oct. 25, 2023 | Nov. 2, 2023 | Nov. 6, 2023 | Nov. 17, 2023  
Nov. 21, 2023 | Nov. 29, 2023 | Dec. 7, 2023 | Dec. 11, 2023

### Wisconsin Employment Law Codebook 2023

With the Wisconsin Employment Law Codebook by your side, you'll always have ready access to the latest statutes and regulations governing employment, including topics like worker's compensation, the Family and Medical Leave Act, and fair employment laws. Add it to your employment law toolkit today.

**Print Book:** #AK0426E23; 634+ pp.; 2023; **Member:** \$81 | **Nonmember:** \$101.25

### Civil Litigation Forms Library

Save time, improve your accuracy, and take some of the frustration out of civil litigation. The *Civil Litigation Forms Library* contains hundreds of fillable forms, including summonses and complaints; motions, affidavits, and orders; interrogatories, authorizations, and much more! Plus, the library is fully searchable by title and keyword so you'll always find the right form when you need it.

**Online Subscription:** #FSFB3000; **Members Only:** \$159/year  
(Discounts available on multi-user subscriptions.)

## Schedule

### 8:00 AM Registration

### 8:30 AM Contracting Terms for Benefit Plans

- The types of contracts that plan sponsors sign with respect to various benefit plan arrangements.
  - Why contracting with third parties is a fiduciary function.
  - Contract terms to negotiate specific to health/welfare plans and retirement plans.
- David Eckhardt*

### 9:20 AM Class Action Fiduciary Litigations under ERISA

*Paul M. Secunda*

### 10:10 AM Break

### 10:25 AM SECURE 2.0 and 1.0 Changes for Individual Estate Planning

- Required Minimum Distributions
  - Rothification
- Brian L. Anderson*

### 11:15 AM Executive Compensation Update

*Martin P. Tierney*

### 12:05 PM Lunch

### 1:05 PM Mistakes Happen – How to Fix Them

- SECURE 2.0 changes to recovery of overpayments and EPCRS overhaul
  - Common retirement plan errors and correction tips
  - Missing participant issues in Department of Labor investigations
  - Paying for error correction from plan assets
  - Options for correcting health and welfare plan errors
- Amy A. Ciepluch*

### 1:55 PM SECURE 2.0

- Automatic enrollment for new plans
- Matching contributions on student debt repayments
- Emergency distributions
- Long-term, part-time eligibility requirements
- Hardship distribution changes

- New distributable events (domestic abuse, federal disaster declarations, etc.)
- Steven E. Grieb, Mary Ellen Schill*

### 2:45 PM Break

### 3:00 PM SECURE 2.0 (cont.)

- Tax credits for small employer start up plans
  - 403(b) plan investments in CITs
  - Starter 401(k)
  - DOL's retirement savings lost & found program
  - Benchmarks for mixed asset funds
  - Provisions regarding annuity investments
- Steven E. Grieb, Mary Ellen Schill*

### 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

**Amy A. Ciepluch** – Foley & Lardner LLP, Milwaukee

**David Eckhardt** – Husch Blackwell LLP, Milwaukee

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

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

**Paul M. Secunda** – Walcheske & Luzi LLC, Brookfield

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

## 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.

## Dates

## Location

### In-Person Seminar – Madison

Thursday, September 7, 2023

#### State Bar Center

5302 Eastpark Blvd.

Madison, WI

(608) 257-3838

### Live Webcast

Thursday, September 7, 2023

### Webcast Replay

Friday, September 15, 2023

Monday, September 25, 2023

Tuesday, October 3, 2023

Wednesday, October 11, 2023

Friday, October 20, 2023

Thursday, October 26, 2023

Wednesday, November 1, 2023

Monday, November 13, 2023

**Additional webcast replay dates are available for this program.** Visit [wisbar.org/seminars](https://wisbar.org/seminars) for more information and to register.

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**[wisbar.org/ondemand](https://wisbar.org/ondemand)**

# Registration

**ONLINE:** 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](http://wisbar.org/cancellations) 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 two days prior to and 90 days after your seminar.

## COVID-19 safety information:

Complete and current safety guidelines can be found at [wisbar.org/covidsafety](http://wisbar.org/covidsafety).



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## IN-PERSON SEMINAR:

Thurs., Sept. 7, 2023 –  
Madison

## LIVE WEBCAST:

Thurs., Sept. 7, 2023

## WEBCAST REPLAYS:

Fri., Sept. 15, 2023

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Mon., Nov. 13, 2023

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P.O. Box 7158  
Madison, WI 53707-7158

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