



ERIC Fall 2016 Policy Conference

New Location: Morgan Lewis
1111 Pennsylvania Ave. NW

Wednesday, October 19, 2016

11:45–12:45 p.m.

Registration & Networking Lunch

12:45–1:00 p.m.

Welcome

1:00–1:45 p.m.

Keynote: Stan Collender

Stan Collender is Executive Vice President of Qorvis MSLGROUP, specializing in financial communications. As one of the world’s leading experts on the U.S. budget, taxes and congressional budget process, he will share his insights on what we can expect to see from the next Administration and the new Congress and how their actions could affect how you offer benefits.

2:00–4:00 p.m.

Concurrent Sessions

2:00–2:50 p.m.

What is Schedule J of Form 5500?

The Labor Department has proposed a significant rewrite of the annual Form 5500 reporting requirements, including an entirely new section, “Schedule J,” in which plan sponsors will be asked to submit a large amount of information about their group health plans. This session will analyze the proposed construction of the new Schedule J, as well as some of the other proposed changes to the Form 5500.

3:00–3:50 p.m.

Defined Benefit Plans: What Will the Future Hold?

PBGC Premiums, funding, mortality tables, composite plans, section 420 options, Labor Department missing participant audits, multi-employer reform, de-risking, IRS Determination letters, closed plan rules. While each subject stands on its own, they all add up together to shape the future of the defined benefit system.

2:00–2:50 p.m.

My Employees are Drowning in Student Loan Debt

This panel will review the programs that employers are offering to their employees and discuss current legislative proposals that would assist employers in providing effective student loan repayment programs.

3:00–3:50 p.m.

Consumerism in Health Benefits: Education & Engagement

Employers are increasingly looking to consumerism, both to help enlist plan beneficiaries in cost-control and quality efforts, and to help employees preserve and build capital. This session will look at the options and strategies plan sponsors are currently using to put employees in the driver’s seat, and help them save. The session will also discuss relevant legislative proposals.

4:00–4:50 p.m.

Ask the Regulators

Amy Bassano, Deputy Director, Center for Medicare and Medicaid Innovation, Centers for Medicare and Medicaid Services, Department of Health and Human Services

Joe Canary, Deputy Director of Office of Regulations, Department of Labor
(invited)

Amy Turner, Director, Office of Health Plan Standards and Compliance Assistance, Department of Labor

Carol Weiser, Deputy Benefits Tax Counsel, Department of the Treasury

5:00–5:30 p.m.

Reflections from Top U.S. Treasury and Labor Department Regulators

The Honorable Phyllis Borzi, Assistant Secretary, Employee Benefits Security Administration, U.S. Department of Labor

Mark Iwry, Senior Advisor to the Secretary, Deputy Assistant Secretary for Retirement and Health Policy, U.S. Department of Treasury

5:30–7:30 p.m.

Reception

Location: Morgan Lewis Rooftop

(All are welcome and encouraged to attend)

ERIC Fall 2016 Policy Conference

Morgan Lewis
1111 Pennsylvania Ave. NW

Thursday, October 20, 2016

- 8:00—9:00 a.m. **Breakfast**
- 8:45—9:15 a.m. **Welcome**
- 9:20—11:45 a.m. **Concurrent Sessions**

9:20—10:35 a.m.

Does ERISA Preempt Anymore?

ERISA was passed in part to protect plan sponsors from a nightmare patchwork of conflicting state and local rules with federal law preemption. Over time, however, states and localities have passed requirements that seem to survive preemption, raising serious questions and concerns. This session will examine the legal state of ERISA preemption, specifically in the wake of the Gobeille and Snyder cases, and discuss future threats to preemption.

10:45—11:45 a.m.

401(k) Plan Issues

Lawmakers and regulators have many proposals that impact the costs to provide 401(k) plans—lifetime income calculations, electronic disclosure, fiduciary rule implementation, auto enrollment changes, Form 5500 revisions, and many more— all of which will require amendments to retirement plans in a world without a determination letter program. This panel will review numerous proposals and encourage member feedback as we shape ERIC's public policy strategy.

9:20—10:35 a.m.

State of the States: Benefit Mandates

In the last year, states have enacted over 42,000 pieces of legislation. Add regulatory and local rules, and the number quickly exceeds 50,000 new government-issued requirements. This overwhelming activity includes a growing number of state mandates on employee benefits. This panel will discuss why states are increasing activity in the employee benefits sphere, what authority states and localities are exercising to advance these regulations, and how employers can prepare for them.

10:45—11:45 a.m.

Tax Reform (Retirement & Health Care)

It's been 30 years since major tax reform took place, and appetite for another round is growing in Washington. What would tax reform mean for plan sponsors' ability to offer group health benefits and retirement plans? This panel will discuss the possibilities that tax reform might hold for health and retirement benefits and the impact it could have on your benefit plans.

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11:45–12:45 p.m.

Networking Lunch

12:30–1:45 p.m.

Keynote: Chris Jennings

Chris Jennings is a policy advisor to Hillary Clinton and recently served as Deputy Assistant to the President for Health Policy and Coordinator of Health Reform to President Obama. He served in a similar capacity in the Clinton White House for nearly eight years. Jennings has helped implement the Affordable Care Act’s access and delivery reform provisions (for President Obama) as well as played leadership roles in the development, passage and implementation of bipartisan health reforms during both the Obama and the Clinton Administration. He is the founder and president of Jennings Policy Strategies.

2:00– 3:00 p.m.

Can Changing Government Policy Help to Control Drug Costs?

The rapid growth of prescription drug costs is confounding plan sponsors, beneficiaries, and consumers writ large. Join us for a discussion of recent policy proposals aimed at getting these costs under control, examples of what employers are doing to cope with the costs, and ideas for how ERIC advocacy can work to change government policy, drive efficiency, and impact the prescription drug spend.

3:00 p.m.

Conclusion