



SUNDAY, APRIL 27TH, 2008

- 3:00-4:00 PM** **EARLY REGISTRATION**
- 4:00-6:00 PM** **WELCOME RECEPTION**
HOSTED BY: MANAGERS INVESTMENT GROUP

MONDAY, APRIL 28TH, 2008

- 7:30-8:45 AM** **REGISTRATION AND BREAKFAST**
HOSTED BY: WILSHIRE ASSOCIATES
- 8:45-9:00** **WELCOME AND OPENING REMARKS**
- Advisory Board Chairperson:**
Nancy Webman, Editor, Pensions & Investments
- Conference Co-Chairperson:**
Luke Collins, Sr. VP of Business Development, Managers Investment Group, LLC
- 9:00-10:00** **WASHINGTON UPDATE**
- Jamey Delaplane**, Partner, Davis & Harman
- 10:00-10:45** **FEE DISCLOSURE: PROPOSED RULES, ISSUES AND CONCERNS**
This panel will address the requirements for increased disclosure of 401(k) fee information to participants.
- What are the best approaches to disclosing revenue sharing arrangements?
 - What is the litigation risk, and how can it be reduced?
 - Should sponsors consider re- structuring provider fees to avoid possible confusion or participant “push back”?
 - What will be the overall impact on employee choices – will they be improved?
- Moderator:**
Mike Barry, President, Plan Advisory Services
- Bob Eccles**, Partner, O’Melveny & Myers LLP
- Lori Lucas**, Sr. VP/ (DC) Practice Leader, Callan Associates
- Robyn Alcorta**, Vice President, Charles Schwab
- 10:45-11:15** **NETWORKING BREAK**

11:15-12:15

FEE ANALYSIS AND NEGOTIATIONS:

Hear first hand experiences from DC plan executives on how they went about analyzing and renegotiating plan fees.

- What is the prudent process for evaluating and negotiating fees?
- The different types of revenue sharing models
- Top 5 things to look for when negotiating your contract
- How to determine if your fees are reasonable
- How to capture excess revenue

Moderator:

Marina Edwards, Senior Consultant, Towers Perrin

Silvia Frank, Manager, DC Plans, Trinity Health

Dawn Kalamaras, SVP - Benefits Design and HR Policy, HSBC North America Inc.

Gail Garrison, Finance Professional - Trust Investments, Ameren Services

12:15-1:30

NETWORKING LUNCHEON

HOSTED BY: GOLDMAN SACHS ASSET MANAGEMENT

1:30-2:30

DIFFERENT APPROACHES TO EVALUATING AND MONITORING QDIAs

This session will explain the variety of factors which should be considered by plan sponsors when evaluating or monitoring QDIAs.

- Complying with recent QDIA regs
- Overview of various glidepath strategies
- Benchmarking and monitoring QDIAs
- Assessing risk vs. performance
- Custom vs. pre-packaged
- Evaluating the underlying investments/asset classes

Moderator:

Jennifer Marconi-Flodin, AIF, PRP, Chief Operating Officer & Co-Founder, Plan Sponsor Advisors

James K. Daley, CEBS, CFA, CFP, VP - Head of Asset Allocation, Participant Solutions Group, Diversified Investment Advisors, Inc.

Christina Stauffer, CFA, Vice President and DC Business Manager, PIMCO

Charles M. Stunkard, CFA, Managing Director, Wilshire Associates

Marla Kreindler, Partner, Winston & Strawn

2:30-3:00

NETWORKING BREAK

3:00-4:00

PLAN SPONSOR PERSPECTIVES ON AUTO PILOT PROGRAMS

In this session we'll talk with plan sponsors to gain perspectives on the implementation process and reaction of automatic features into their DC plans.

- To what degree has automation helped?
- Are employees opting out?
- Are we seeing resistance to auto increased contributions?
- Should you be re-defaulting employees into QDIAs?

Moderator:

Brian Dennen, Senior Consultant, Curcio Webb LLC

Shelley Hughes, Director of Human Resources, Applied Systems, Inc.

Darcy Schmidt, Manager Retirement Plans Communication, ITW

4:00-5:00

RETIREMENT INCOME STRATEGIES: ADDRESSING LONGEVITY RISK FOR PARTICIPANTS

This session will discuss how we as an industry can ensure that participants don't outlive their money.

Moderator:

Douglas M. Balsam, CIMA, Principal & Director of Institutional Consulting, DiMeo Schneider & Associates, L.L.C.

John Sturiale, Director-Retirement Investment Strategies, Charles Schwab

Mary Fisher, Benefits Administration Manager, Smithfield Foods

Alan R. Perry, SPHR, Vice President, Human Resources, Norstan, dba Black Box Network Services

5:00-6:30 PM

COCKTAIL RECEPTION

HOSTED BY: PIMCO

TUESDAY, APRIL 29TH, 2008

7:30-9:00 AM

NETWORKING BREAKFAST

HOSTED BY: WILSHIRE ASSOCIATES

9:00-9:15

RECAP OF DAY 1 HIGHLIGHTS

Conference Co-Chairperson:

Jaime Erickson, Manager, Defined Contribution Plans, Akzo Nobel

9:15-10:00

HOW DC PLANS ARE BEING HIT BY THE FALLOUT FROM THE CREDIT CRUNCH

Since the sub-prime mortgage mess started and the credit crunch hit, DC plan executives and participants are expressing major concerns over their investment options. This session will shed light by providing a checklist on what to look for and what to be asking your asset managers.

- What underlying holdings in different types of investments have been impacted?
- Going down the correct path of due diligence with managers
- Limiting your exposure to sub-prime and insulating your plan from market volatility
- How to address participants concerns
- Do we see light at the end of the tunnel?

Co-Presenters:

Robert M Cahill, Managing Director, Stable Value Group, DB Advisors

Gary Silverman, CFA, Chief Investment Officer, Blue Prairie Group

10:00-10:30

NETWORKING BREAK

10:30-11:30

MANAGING THE WATCH LIST: DC INVESTMENT POLICY REVIEW

- When to add a fund to the watch list
- How to know when it's time to terminate an asset manager
- Issues with changing out funds
- Proprietary vs. non-proprietary funds in a bundled arrangement

Kevin J. Vandolder, CFA, Principal, Ennis Knupp + Associates

John H. Streur, Jr., Senior Managing Partner, Managers Investment Group, LLC

Chris Anast, Vice President, Investment Strategies, Mesirow Financial

11:30-12:15

KEYNOTE

Congressman Pomeroy will address 401(k) legislation, his proposals to encourage the use of lifetime income options in defined contribution plans, and efforts to expand retirement savings opportunities to those without employer retirement plan coverage.

Rep. Earl Pomeroy (D-ND)

12:15-1:00

NETWORKING LUNCHEON

1:00-3:00

FIDUCIARY GOVERNANCE (K)RASH COURSE

(Limited to plan sponsors)

As fiduciaries, you are expected to establish, adopt and execute a comprehensive system of controls that assures a prudent substantive process for managing your retirement plan.

This two-hour interactive workshop is designed to walk you through fiduciary best practices and pitfalls, and make you a more informed and more effective plan committee member.

Workshop Facilitator:

Steve Lansing, CIMC, CEBS, Senior Consultant, The Bogdahn Group

Michael S. Melbinger, Partner & Chair of Employee Benefits and Executive Compensation, Winston & Strawn, LLP

Lori Lenard, Senior Counsel, Discover Financial Services

D. Don Ezra, Director of Strategic Advice, Russell Investments

3:00 PM

CONFERENCE ADJOURNS

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3. Fax to: (516) 765-9015 Attn: Cathy Fenn
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