



Calibre CPA Group's Employee Benefit Plan Conference 2018
Annual Update

Date: February 1, 2018

Location: Capital Hilton – 1001 16th St. NW – Senate Room

Time: 7:45AM-12PM

Agenda

Registration & Breakfast	7:45AM-8:30AM
Welcome & Opening Remarks -Jim Kokolas, Partner, Calibre CPA Group	8:30AM-8:40AM
<i>Proposed Changes to 5500 and EBP Reporting</i> -Glenn M. Eyrich, Partner, Calibre CPA Group	8:40AM-9:10AM
<i>Alternative Investments: Accounting & Audit</i> -Derrick Stronsider, Partner, Calibre CPA Group -Mary Margaret Prange, Partner, Calibre CPA Group	9:10AM-9:25AM
<i>Alternative Investments: Tax Implications</i> -Scott Hallberg, Senior Tax Director, Calibre CPA Group	9:25AM-9:40AM
<i>Cybersecurity and Data Privacy Concerns for EBPs</i> -Allison Itami, Principal, Groom Law Group	9:40AM-10:25AM
Break	10:25AM-10:40AM
<i>Legislative and Other Proposals to Address the Defined Benefit Multiemployer Plan Underfunding Crisis</i> -Peter Leff, Member, Mooney, Green, Saindon, Murphy & Welch	10:40AM-11:10AM
<i>Defined Contribution Hot Topics for 2018</i> -Alexander G. Assaley, III, Managing Principal, AFS 401k	11:10AM -11:40AM

Update and Summary on New Tax Act

- Subrina Wood, Senior Tax Director, Calibre CPA Group
- Scott Hallberg, Senior Tax Director, Calibre CPA Group

11:40AM -12:10PM