

THURSDAY, APRIL 24, 2025

CONFERENCE DAY 1

07:45 – 08:30	Badge Pick Up and Continental Breakfast	
08:30 – 08:45	Conference Welcome	<i>Moderator</i>
08:45 – 10:45	Session 1 Keeping Current	<i>Ilene Ferenczy, Derrin Watson</i>
10:45 – 11:10	Break/Snack	
11:10 – 12:10	Session 2 It's Quite the Operation: Governance and Fiduciary Concerns	<i>Alison Cohen, Jason Douthit</i>
12:10 – 01:10	Lunch	
01:10 – 02:05	Session 3 Workplace, Leased, and Shared, Oh My!	<i>Adriana Starr, Derrin Watson</i>
02:05 – 03:00	Session 4 What's the Diagnosis? Controlled Group vs. Affiliated Service Group	<i>Adriana Starr, Carolyn Cumbee</i>
03:00 – 03:25	Break/Snack	
03:25 – 04:25	Session 5 Ask the Oracles – Part 1	<i>Speaker Panel</i>
04:30 – 05:30	Cocktail Hour	
05:30 – 05:30	Board Bus to BBQ (meet in hotel lobby)	
06:00 – 08:30	Renowned BBQ Hosted by Alison Cohen	



FRIDAY, APRIL 25, 2025

CONFERENCE DAY 2

07:30 – 08:30	Continental Breakfast	
08:30 – 09:25	Session 6 Fight the Virus: Cybersecurity and You	<i>Special Guest Speaker</i>
09:25 – 10:20	Session 7 I Need a Scalpel and a PEP, Stat!	<i>Adrienne Moore, Ilene Ferenczy</i>
10:20 – 10:45	Break/Snack	
10:45 – 11:45	Session 8 Stitching Up the Wound: EPCRS, PT, and 5500 Corrections	<i>Leah Dean, Morgan Baumgard</i>
11:45 – 12:45	Lunch	
12:45 – 01:40	Session 9 The Doctor Is In: Handling an IRS/DOL Audit	<i>Adrienne Moore, Alison Cohen</i>
01:40 – 02:35	Session 10 Flatlining in a Plan: DB/CB Termination Issues	<i>Carolyn Cumbee, Lorraine Dorsa</i>
02:35 – 03:00	Break/Snack	
03:00 – 04:00	Session 11 Paging Doctor Ethics	<i>Alison Cohen, Ilene Ferenczy</i>
04:00 – 05:00	Session 12 Ask the Oracles – Part 2	<i>Speaker Panel</i>
05:00 – 05:05	Closing Remarks	<i>Moderator</i>



THANK YOU TO OUR SPONSORS!

DIAMOND



STAX.AI



colonial
BONDS & INSURANCE

GOLD



**CAPITAL
GROUP®**



Pension Assurance



TRANSAMERICA®
Retirement Solutions



Fidelity
INVESTMENTS



Nationwide®
is on your side



Principal™



ERISApedia

PensionPro™



TruStage™



BenefitsLink.com
EmployeeBenefitsJobs.com

MC
MOORE COLSON
Advisory • Tax • Assurance



PENCHECKS®
TRUST



Wolters Kluwer

John Hancock®



FERENCZY
BENEFITS LAW CENTER
ERISA
We are your solution®