Fundamentals of Health and Welfare Plans

THE MADISON CHAPTER OF THE INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS PRESENTS A FULL-DAY SEMINAR:

"Fundamentals of Health and Welfare Plans."

Each session will be presented by experienced professionals, giving new entrants to the benefits field a unique and excellent opportunity to learn the fundamentals of their profession. Experienced human resource managers and professionals will also gain from the opportunity to see an overview of fundamental benefit issues that pertain to all employers.

Please note that registration will be limited to ensure a high-quality educational experience.

September 14, 2007
Sheraton Hotel
Madison, Wisconsin

This program is approved for 6.0 CEUs through the Office of the Commissioner of Insurance.
Program

SCHEDULE

REGISTRATION AND CONTINENTAL BREAKFAST
7:30-8:00 a.m.

INTRODUCTION TO PROGRAM
8:00-8:15 a.m.

SESSION 1
8:15-9:00 a.m.
INTRODUCTION TO HEALTH AND WELFARE BENEFIT PLANS
Speaker: Adam Jocson, J.D., CEBS, CBPA, FLM
Senior Consultant, Windom Keune Employee Benefits, LLC
- What are Health and Welfare (H&W) Plans?
- Company Objectives in Offering H&W Plans
- Different Employer Philosophies in Offering H&W Plans
- Financial Impacts of Offering H&W Plans

SESSION II
9:00-10:00 a.m.
LEGAL ENVIRONMENT — PART 1
Speaker: Brian L. Anderson, J.D., LL.M., CPA, CEBS
Attorney at Law
Dewitt, Ross & Stevens, S.C.
- ERISA
- Reporting and Disclosure
- Communicating Employee Benefits

SESSION III
10:15-11:15 a.m.
LEGAL ENVIRONMENT — PART 2
Speaker: Brian L. Anderson, J.D., LL.M., CPA, CEBS
Attorney at Law
Dewitt, Ross & Stevens, S.C.
- COBRA
- HIPAA
- ADA
- FMLA
- Workers' Compensation

SESSION IV
11:15 a.m. - 12:00 noon
THE ROLE OF COMMUNICATIONS IN BENEFIT MANAGEMENT
Speaker: Anita Zaman, CEBS
Director, PR/Communications
WEA Trust
- Communications as a Strategy Tool
- Communications as an Employee Education Tool
- Communications as a Change Agent
- Effective Communications Strategy and Implementation

BREAK
10:15-10:30 a.m.

SESSION V
1:00-2:00 p.m.
MANAGED HEALTH CARE PLANS
Speaker: Peter Antoncic, CEBS
Consultant
WEA Trust
- Overview of Managed Care
- Development of Alternative Delivery Systems
- HMOs, PPOs, POS, Managed Indemnity Plans
- Delivering Quality of Care

BREAK
2:00-2:15 p.m.

SESSION VI
2:15-3:15 p.m.
FLEXIBLE BENEFIT PLANS
Speaker: Nancy Danzinger
Vice President, Sales
eBenefits.com
- Overview of Section 125 and Cafeteria Plans
- Plan Design Considerations
- TRENDS TO FLEXIBLE BENEFITS
- Future Outlook of Flexible Benefit Plans

WRAP-UP AND EVALUATIONS
3:15-3:30 p.m.

DATE: September 14, 2007 (Friday)
TIME: 7:30 a.m. - 3:30 p.m.
LOCATION: Sheraton Hotel
705 John Nolen Drive
Madison, WI 53713
COST: $150 per person ($130 if two or more people from the same company)
R.S.V.P.: by September 7, 2007
Registrations will be accepted on a first-come, first-served basis. A $25 administrative charge will apply for cancellations and refunds on or prior to September 7, 2007. No refunds will be made for cancellations after September 7, 2007.
Tax ID: #03-1781060
*Includes lunch, breaks, and program materials.

REGISTRATION FORM (Please Print)

Name ____________________________
Title ____________________________
Company ____________________________
Address ____________________________
City __________________ State ______ ZIP ______
Telephone (_____) E-mail __________________

☐ Please check if you are a licensed intermediary and will be seeking continuing education credits.
Make check payable and mail to: MADISON CHAPTER—ISCERB
Ten Terrace Court
P.O. Box 7696
Madison, WI 53707-7696

B.S.V.P.: By September 7, 2007
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Fundamentals of Health and Welfare Plans
September 14, 2007
$150/$130

Madison Chapter

This program is sponsored by the Madison Chapter of the International Society of Certified Employee Benefit Specialists (ISCERB), a nonprofit organization that serves as an educational resource for certified employee benefit specialists. If you have any questions about the program or the Madison Chapter, please contact Melissa Mauer, CEBS, at (608) 799-2337.