



## **Agenda**

### **Employer Health and Wealth Administrator Workshop**

Tuesday, August 21, 2018 | 8:30 a.m.- 3:00 p.m.

Hilton Columbus at Easton

3900 Chagrin Dr, Columbus, Ohio 43219

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| <b>7:30-8:30 a.m.</b>   | <b>Breakfast and Registration</b>  |
| <b>8:30-9:30 a.m.</b>   | <b>Back to Basics: Documentation and Reporting for Health and Welfare Plans</b><br>Kimberly Wilcoxon, Esq., partner, Employee Benefits & Executive Compensation Practice Group, Thompson Hine LLP                                    |
| <b>9:30-10:30 a.m.</b>  | <b>Aiming for the Retirement Bullseye</b><br>Mario Giganti, president and senior advisor<br>Cornerstone Capital Advisors   |
| <b>10:30-10:45 a.m.</b> | <b>Break</b>   |
| <b>10:45-11:45 a.m.</b> | <b>HIPAA: What Employers Need to Know to Protect Their Company</b><br>Lyndsey Barnett, Esq., chair, Business and Finance Department  |
| <b>11:45-1:00 p.m.</b>  | <b>Lunch and Employers Health Update</b><br>Mike Stull, chief marketing officer<br>Employers Health  |
| <b>1:00-1:15 p.m.</b>   | <b>Break</b>   |
| <b>1:15-2:15 p.m.</b>   | <b>Making Friends with the Fair Labor Standards Act:<br/>New “Employer-Friendly” Changes and How You Should Comply</b><br>Robert Gilmore, Esq., chair, Litigation and Labor and Employment Practice Groups, Kohrman Jackson & Krantz |
| <b>2:15-3:15 p.m.</b>   | <b>Department of Labor Investigations of Employee Benefit Plans</b><br>Sherry Brackney, senior benefits advisor<br>U.S. Department of Labor  |



## Outline

### Employer Health and Wealth Administrator Workshop

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**8:30-9:30 a.m.**

#### **Back to Basics: Documentation and Reporting for Health and Welfare Plans**

Kimberly Wilcoxon, Esq., partner, Employee Benefits & Executive Compensation Practice Group

The Employee Retirement Income Security Act (ERISA) sets minimum standards for most voluntarily established pension and health plans. Attendees will gain valuable insight on the importance of:

- *The multiple documents that must be maintained by an ERISA-governed welfare plan*
- *Disclosures and the method by which they must be given to participants in an ERISA-governed welfare plan*
- *The numerous reporting obligations of an ERISA-governed welfare plan*

**9:30-10:30 a.m.**

#### **Aiming for the Retirement Bullseye**

Mario Giganti, president and senior advisor  
Cornerstone Capital Advisors

*Mario will show sponsors of 401(k) plans how to educate, activate and influence employees to save enough money to build their own retirement income for life while fulfilling their fiduciary duties. His presentation will cover:*

- *What is a retirement plan's "Target"*
- *What are 401(k) Plan Measurements that all sponsors need to know*
- *Which Employees need help and why*

**10:45-11:45 a.m. HIPAA: What Employers Need to Know to Protect their Company**

Lyndsey Barnett, Esq., chair, Business and Finance Department

*The Health Insurance Portability and Accountability Act (HIPAA) protects the privacy of health information. Lyndsey will discuss:*

- *Who is covered under HIPAA and what information is protected*
- *Responsibilities of employers in protecting health information of their participants*
- *What to do if you have a HIPAA violation, and recent examples of HHS enforcement of HIPAA*

**1:15-2:15 p.m. Making Friends with the Fair Labor Standards Act:**

**New “Employer-Friendly” Changes and How You Should Comply**

Robert Gilmore, Esq., chair, Litigation and Labor and Employment Practice Groups, Kohrman Jackson & Krantz

*Employers are constantly grappling with new interpretations of the FLSA, especially given the most recent guidance set forth by the United States Supreme Court. In this presentation, Rob will discuss:*

- *Proactive ways for employers to avoid the most common FLSA mistakes*
- *Ways employers may prevent a potential FLSA class action suit*
- *How employers should respond to the most recent Supreme Court decisions regarding FLSA compliance*

**2:15-3:15 p.m. Department of Labor Investigations of Employee Benefit Plans**

Sherry Brackney, senior benefits advisor

U.S. Department of Labor

*This presentation will address various issues regarding the investigation of employee benefit plans, such as:*

- *Employee Benefits Security Administration’s strategic enforcement plan*
- *How to be prepared for an audit*
- *Information/documentation needed for audits*