



RICHMOND CHAPTER

International Society of Certified Employee Benefit Specialists

August 2008

RICHMOND CHAPTER

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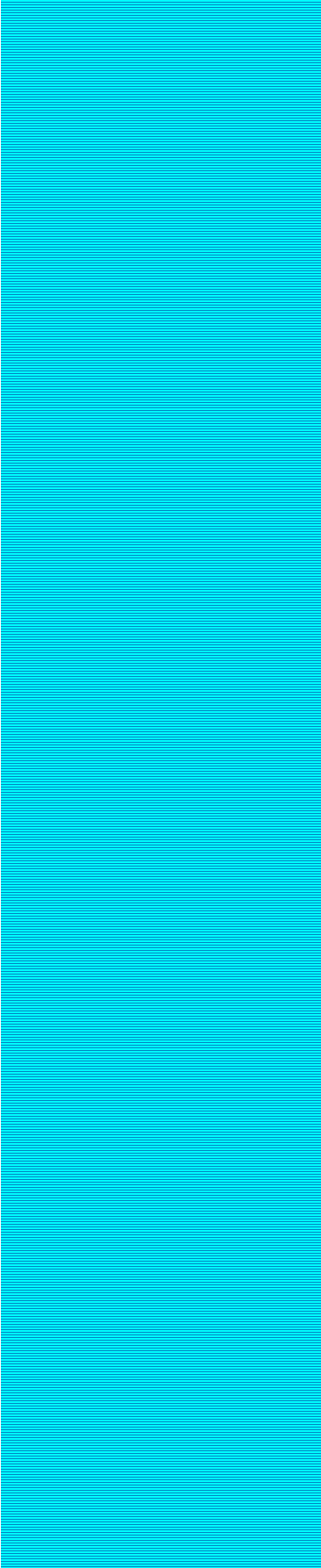
President's Message

As the summer starts to come to an end, we all find ourselves gearing up for changes in our lives. Whether it is a young child going to school for the first time, sending a child off to college, an empty nest (finally!) or enjoying the "off season" at the vacation spots, autumn brings us many challenges and rewards in our personal and professional lives. A fact of life in the fall for many in our industry is also Open Enrollment. Now is the time that we are evaluating new strategies, increased costs, legislation changes and determining the best way to communicate all of this to employees. Whether you are an employer, broker or consultant, education is the key to a successful benefits plan. As part of your personal education strategy, or just trying to get those CE credits in before the end of the biennium, the local chapter is here to help.

We are providing upcoming sessions with regards to retirement planning and the political environment and its impact on health care and retirement. The speakers that are scheduled for the retirement half day education session on September 10th will be providing us with educational sessions on retirement planning, estate planning and lifecycle fund management. These are timely topics and will be well received as both topics for us as plan administrators, consultants and future retirees. It's never too early to start planning, or is that just this baby boomer rapidly approaching AARP eligibility!! Over the next couple of months, we will be providing some speakers addressing some of the political aspects of our industry and how these factor into the upcoming elections. So, mark your calendars now for these educational events.

With all of the other year end activities, the Richmond ISCEBS Board will be appointing a nominating committee to set the slate for next year's Board officers and committee chairs. If you are interested in becoming part of the Board or one of the committees, or if you know of anyone that is looking for way to become more involved in the local chapter, please contact myself or anyone currently on the Board. The slate of officers for next year's election will be presented to the membership by the end of September. We always look forward to new faces and old hands, so consider a role on the Board or a committee for next year.

This year the ISCEBS Symposium takes us to the Disney's Yacht and Beach Club in Lake Buena Vista, Florida on September 21st – 24th. I will be proudly representing the Richmond Chapter at this event and I am anxious to know of other chapter members that will be attending. This is a wonderful opportunity to hear speakers from around the



country in one forum and network with well-known experts in our field. The International Society of CEBS provides this excellent annual event and I encourage anyone to attend. During the symposium, we will plan a dinner event for all Richmond chapter attendees on Tuesday evening. Let me know if you are attending so we can plan a fun event.

And finally, what summer would be complete without the “End of Summer” social? We do look forward to this event every year where we can get together with each other, relax, and recognize our own chapter members that have reached CEBS accomplishments over the past year. I hope each of you is planning on attending on September 25th. I would also suggest that this is a perfect opportunity to introduce a coworker, client, or a new college graduate to our organization.

Please Join Us for the September 10, 2008 Educational Event!

Presentation: Retirement Planning and Trends – CE credit available
(hours and type pending approval)

Program:

7:30 a.m. Breakfast/Registration

8:00 a.m. Speaker: Bob Sanford
Sanford Actuarial and Benefits Consulting, LLC
Topic: “Surviving the Transition to Retirement: Helping Your Employees Navigate The Way”

9:00 a.m. Speakers: Larry Elliott and Rick Owens
SunTrust
Topic: “This is Life”

10:00 a.m. Speakers: Ted Darlington
Fidelity Investments
Topic: “Build a Portfolio for any Weather”

11:00 a.m. Speaker: Burl Bachman, ASA, EA, MSPA, President
Retirement Plan Administrative Service, Ltd.
Topic: Top 10 Opportunities to Help Retirement Plan Sponsors

Date and Time: Wednesday, September 10, 2008
7:30 a.m. to 12:00 p.m.
Breakfast served

Location: Westwood Racquet Club, 6200 West Club Lane

(804) 288-6028

Cost: \$75 (\$60 for members of the Richmond Chapter of ISCEBS)

Please RSVP: By September 5, 2008 to Craig Rupert (crupert@rcmd.com or 804-237-5910) or Claire Holbrook at claire.holbrook@wachovia.com or (804) 267-3190).

Questions: Contact Craig Rupert, CEBS, at 804-237-5910, or e-mail crupert@rcmd.com.

Make checks payable and mail to:
Richmond Chapter-ISCEBS
P.O. Box 6513
Richmond, VA 23230

Or you may pay at the door, if you have RSVP'd

Note: Meeting fees are non-refundable unless cancellation is received before September 5, 2008. **Unpaid no-shows will be billed.**

Mark Your Calendar For The Following Upcoming Chapter Events in 2008!

September 25, 2008

End of Summer Social 5:00 to 7:30 p.m.

Westwood Club

October 9, 2008

Luncheon Meeting 11:45 a.m. to 1:15 p.m.

Westwood Club

Speaker:

Dr. Robert Holsworth, Dean of the College of Humanities and Sciences,
VCU

November 13, 2008

Annual Meeting (Breakfast) 7:30 to 9:30 a.m.

Westwood Club

Speaker:

Lieutenant Governor Bill Bolling
“Challenges and Opportunities facing Virginia”

Membership Chairman's Message

I am sure you have heard the expression, "It is not what you know but who you know". Well, it is really both!!!

I would like to pass a big "Congratulations" to three people who continue to increase what they "know" through the CEBS program. Their hard work and dedication to learning has helped them increase their industry knowledge. Please join me in congratulating...

Judith Kneipp – RPA
Carrie Rebecca Felts – CEBS, RPA
Steven Haynes – CEBS

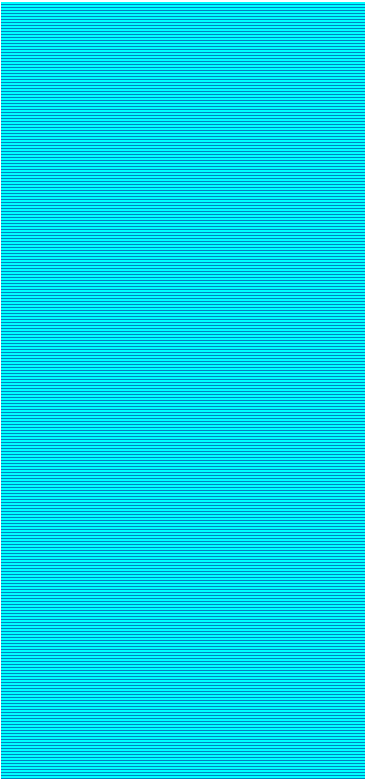
Obviously the world of human resources and employee benefits requires detailed knowledge of a variety of topics – and countless initials and acronyms!! Many times our greatest resource for additional learning is our coworkers and fellow associates in our field, i.e. the "who you know". Our Richmond Chapter offers a convenient and cost effective way to learn from others in the area – and to meet new people and gather ideas from human resource and benefit professionals.

Do you know someone who could benefit from the CEBS program? Invite them to an upcoming event. Encourage them to obtain information about the CEBS program from WWW.ISCEBS.ORG or have them call or email me for more information.

Enjoy the remainder of the summer.

Sincerely,

Rick Owens, CEBS
Membership Chair
804-782-7553
Rick.owens@suntrust.com



Have you visited the ISCEBS web site (www.iscebs.org) lately?
You will be interested to know you have access to a wealth of information about:

- ISCEBS
- Local Chapter
- Job/Resume services
- Survey findings
- News Briefs and Benefits Quarterly
- Live Telewebs and recorded options
- ISCEBS news and Resources
- Library/information center

If you have not been to the site lately, we encourage you to do so. To access the members-only site, enter your member number under the username and enter your last name (all lower case) as your password.