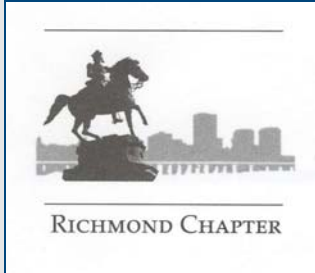




# INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS

August, 2011

ISCEBS RICHMOND CHAPTER NEWSLETTER



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## President's Message

I hope that this newsletter finds you well. The Richmond Chapter of ISCEBS has been busy over the summer preparing for our fall educational programs. But before I outline all that is scheduled, I want to thank Aimee McAfee, Education chair for her hard work coordinating the June Half-Day Health & Welfare educational session. We had close to 40 participants and believe the speakers and their topics were well received. Congratulations to Kevin Barger from Anthem whose name was drawn at random and who will be attending the ISCEBS Symposium in San Antonio this October. Check out the web site for pictures taken at the session.

I am very pleased to announce that we now have the ability to accept on-line registration for our educational seminars with payment available through PayPal. You can experience this first hand at our very next seminar coming September 8<sup>th</sup>. Instructions will be included on the invitation. We welcome all feedback and hope this new capability will be useful to you. Thanks to Craig Rupert and Tina Stevens for their hard work bringing this new option to a reality!

The Full-Day Retirement educational session is on tap for September 8<sup>th</sup>. The program is discussed in detail later in this newsletter, but you can expect a full day of current retirement topics with excellent speakers. We hope you will try to attend. We are in the process for filing for CE credits for this event.

Please mark your calendar for our final educational luncheon of 2011 scheduled for October 13<sup>th</sup>. Mike Huennekens, Vice President at Prudential will be leading a session on disability with a goal of improving your knowledge of this benefit and how to determine the best program for your employees or clients.

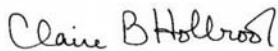
On September 22<sup>nd</sup> from 5:30 – 7 p.m., the Richmond Chapter of ISCEBS will be hosting a social at Capital Ale House in Innsbrook. This is a new outreach for us. The chapter will be providing light appetizers and two drink tickets. This event is a thank you from the chapter, an excellent networking opportunity for all, and a chance for potential CEBS students to learn more about the designation and the chapter. We hope you will attend and invite co-workers who may be interested in learning more about the CEBS designation.

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## President's Message, Continued from page 1

Please consider attending the ISCEBS National Symposium in San Antonio, Texas on October 2 – 5, 2011. Information is available at [www.iscebs.org](http://www.iscebs.org). This program is always an excellent learning and networking opportunity. I know already of several chapter members who will be attending. If you will also be going, please let us know as the chapter always tries to get together for dinner one evening while at the Symposium.

I hope the remainder of your summer is productive but try to take time to recharge as needed. We look forward to seeing you at some of our upcoming events.



Claire B. Holbrook, CEBS  
President, Richmond Chapter ISCEBS

## Mark These Dates on Your Calendar for Educational Events!

### September 8<sup>th</sup>

Full Day Retirement Session – CE Credits!

### September 22<sup>nd</sup>

Richmond Chapter Social at Capital Ale

### October 13<sup>th</sup>

Luncheon Session with Mike Huennekens  
of Prudential

Topic: The Ins and Outs of Disability  
Coverage

### November 10<sup>th</sup>

Breakfast Session and Annual Meeting  
with Jim Durham, Chief Marketing and  
Business Development Officer,  
McGuireWoods LLP

## Please Join Us for the Full Day Retirement Session

**Date &  
Time:** Thursday, September 8, 2011  
7:30 a.m. – 3:00 p.m.  
Includes breakfast and lunch

### PROGRAM HIGHLIGHTS

<b>Larry Elliot &amp; Rick Owens SunTrust</b>	401(k) Education
<b>Lori Wright MERCER</b>	403(b) Plans
<b>Tommy Healy Witt Mares</b>	Top 10 401(k) Audit Issues
<b>Sabrina Holme KSPH</b>	ERISA Regulatory & Legislative Update
<b>Rob Cipolla McGuireWoods</b>	Meeting Fiduciary Responsibilities under ERISA
<b>Scott Fiedler AON</b>	Investment Strategies for DB and DC Plans

### REGISTRATION INFORMATION

**Location:** Westwood Racquet Club  
6200 West Club Lane  
(804) 288-6028

**Cost:** \$60 (\$40 for members of the Richmond Chapter of ISCEBS)

**Questions/  
RSVP:** Please RSVP by September 6th  
Aimee McAfee  
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804-344-3763

**Guest fees-  
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.*  
You may also register and pay at [http://iscebs-  
richmond.org/index.cfm?display=pages&pageid=7511  
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