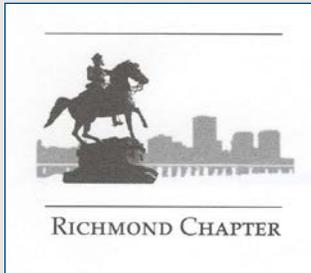




# INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS

August 2013

ISCEBS RICHMOND CHAPTER NEWSLETTER



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Denise Zapf, CEBS  
dzapf@mcguirewoods.com  
(804)775-7333

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tstevens@vmlins.org  
(804)237-7311

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deborah.foster1@wellsfargo.com  
(804)267-3174

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jhuntzinger@scottins.com  
(804)545-2239

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michael.j.finnegan@suntrust.com  
(804)782-7858

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aimee.mcafee@mercer.com  
(804)344-3763

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mriley@ksphllc.com  
(804)200-6891

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rick.owens@suntrust.com  
(804)782-7553

## President's Message

Now that August is upon us, it may be time for that end of summer picnic you've been planning, a trip to the mall for some school shopping, or one final chance at a summer vacation. Whether this month finds you at the beach, in the mountains, at the shopping mall, or at work, I hope you will take some time to plan some interaction with the Richmond Chapter.

We had a great turnout for the June full-day session on health care reform. Little did we know then that the landscape would keep changing even as we head into the final stretch this fall. It pays to stay alert, and to keep your notes from our meetings. You may need those "Pay or Play" notes again next year.

On September 12<sup>th</sup>, be sure to join us for our Retirement half-day session. We will discuss Safe Harbor and Automatic Enrollment Considerations. We will also get a legislative update on Retirement Savings Reform. We will learn how to put together a Pre-retirement Counseling Program (don't we wish someone would do that for us?), and we will ask "To Roth or Not to Roth". The session has been approved for 4 Virginia insurance continuing education credits (3 Life & Health and 1 Laws & Regulations). In addition, we will hold a drawing for an iPad Mini.

Make plans to join us on September 19<sup>th</sup> for our chapter social at The Place at Innsbrook. You will have a chance to meet and network with fellow chapter members and guests. Bring a guest! Bring someone who could benefit from starting their CEBS education, or joining our chapter, or both.

On October 10<sup>th</sup> our lunch meeting will address the topic of Voluntary Benefits. The benefits world is full of chatter about offering voluntary benefits, but should you? If so, what type of benefits and how do you manage it all?

Our annual meeting will be held on November 14<sup>th</sup>. We hope to see you at all of these upcoming events.

**Denise M. Zapf, CEBS, SPHR**  
**President, Richmond Chapter ISCEBS**

## Membership Report

The Mid-Year Membership Challenge Drive has now officially ended and we would like to welcome our newest member, **Hays Falconburg** of Williams, Mullen, Clark & Dobbins, PC. The Richmond Chapter now has 65 members! Thanks to everyone for your continued membership and participation in all our chapter's various activities. Without your support, we could not offer our educational events or our upcoming social at The Place at Innsbrook.

Our 2014 Member Challenge will begin in October. If you have not joined yet or renewed, visit our website at <http://iscebs-richmond.org> or <https://www.iscebs.org/About/Pages/isapp.aspx> for more information and forms. And please let me know of anyone who has interest in our chapter or needs more information. Hope to see you at our September educational event!

**Mary H. Riley, SPHR, GBA, CMS**  
**Membership Chair**

## Please Join Us for the September Retirement Educational Session

**Date & Time:** Thursday, September 12, 2013  
 7:30 a.m. – noon  
 (Speakers begin at 8:00 a.m.)  
 Breakfast will be provided

### PROGRAM HIGHLIGHTS

Rick Owens  
 Sun Trust

**Safe Harbor and Automatic Enrollment Considerations**

Kate Marriott  
 Williams Mullen

**Legislative/Regulatory Update: Retirement Savings Reform**

Jackie Jackson  
 Jack Consulting

**Pre-retirement Counseling: How to Put Together a Program**

Gary Wirwille  
 Wealthcare Capital Management

**To Roth or Not to Roth**

### REGISTRATION INFORMATION

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

**Cost:** Members – \$20  
 Non-members - \$30

**Questions/RSVP:** Please RSVP by September 9, 2013 to Mike Finnegan  
[michael.j.finnegan@suntrust.com](mailto:michael.j.finnegan@suntrust.com)  
 804-387-3902

**Register and Pay Online:** <http://iscebs-richmond.org/index.cfm?display=pages&pageid=7511&sub=1>

**OR**

**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 RSVPd.

Join us on LinkedIn:

[http://www.linkedin.com/groupsDirectory?itemaction=mclk&anetid=1701417&impid=&pgkey=anet\\_search\\_results&actpref=anetsrch\\_name&trk=anetsrch\\_name&go back=%2Egdr\\_1302279957208\\_2](http://www.linkedin.com/groupsDirectory?itemaction=mclk&anetid=1701417&impid=&pgkey=anet_search_results&actpref=anetsrch_name&trk=anetsrch_name&go back=%2Egdr_1302279957208_2)

## Jean Robinson, CEBS, SPHR



### **Current Employer**

Hunton & Williams LLP

### **Background**

Because I was a military spouse, we moved often and I changed “careers” often. I’ve been an insurance agent, trade magazine managing editor, hospital marketing coordinator, book editor, office manager, and human resources manager. I have been in my current position with Hunton & Williams for nearly 15 years—a record for me! Prior to joining Hunton & Williams, I worked in the human resources department at Virginia Commonwealth University for eight years. Go Rams!

### **Favorite Richmond Restaurants**

I enjoy Tarrant’s Café and La Grotta. But my guilty secret is that I like chain restaurants, too. Carraba’s is my favorite.

### **Activities/Interests**

I enjoy traveling in the US and to other countries. I like staying in hotels and B&Bs, but I also enjoy cruises that provide just a preview of places where I may want to spend more time later. I am an avid reader and am an active member of the Hunton & Williams book club. We’re currently reading *John Adams* by David McCullough. I prefer fiction, but our group’s goal is to read books we may not ordinarily select. I enjoy photography and scrapbooking, but let’s just say my work is cut out for me when I retire someday.

### **What got you into the benefits field?**

I worked for many small businesses and volunteered to do HR functions because I was introduced to it in college and my benefits courses were among my favorite. In my experience, small business owners were happy to have someone help out with any HR-related tasks. As I have moved through my career, I came to prefer working in benefits because it incorporates such a wide variety of work, including communications, training and presentations, vendor relationships, financial analysis, and customer service.

### **How has the CEBS designation helped you?**

The biggest advantage to having the CEBS designation is the ability to interact with others who have obtained it, including the ISCEBS Symposiums and the ISCEBS Richmond Chapter. The resources provided through these opportunities are among the best in keeping me up to date on benefits issues. Also, people in this business know the rigor of the course work required for the designation. I have found that it makes a difference in how people perceive me. They know that I have learned from the best and that I am serious about being a benefits professional.