Thriving on Change: Session Tracks

HEALTH & WELFARE

9:30 am

Fully Insured, Self-Insured or In Between: Biting the Bullet or Not?

This session will re-examine best practices for developing a decision matrix for your organization to support this important strategic risk management decision within the context of Healthcare Reform. The panel discussion of plan sponsors and insurance carriers will also include some recent case studies, lessons learned and common pitfalls.

Panelists: Graham Thompson, Arthur J. Gallagher & Co.; John Casper, Premera BlueCross; Bob Donegan, Ivar's; Jill Mehner

10:45 am

The Rise of the Accountable Care Organization

The topic will focus on Boeing's approach and process in the development of their employer-driven ACO and their partnership with Providence-Swedish and UW Medicine. Discussion will include the challenges of implementation, expansion of the current model, and opportunity for scalability and distribution to other markets. Our panelists represent varying perspectives involved with this new and exciting model.

Panelists: Theresa Helle, The Boeing Company; Chris Gorey, Providence/Swedish; Cynthia Dold, UW Medicine; Debra Gussin, UW Medicine; Jonathan Smith, Towers Watson

1:15 pm

Specialty Pharmacy: Past, Present, and Future

Specialty Pharmacy continues to be an exciting topic in 2015. The recent introduction of innovative new treatments, therapies and cures brought specialty pharmacy into the limelight last year. With the expectation of this trend to continue, along with the associated costs, we take an in-depth look at the specialty pharmacy market.

Speaker: Cory Huot, Ardon Health, LLC

2:30 pm

Wellness and Onsite Health

Employer-sponsored onsite clinics are gaining momentum and attention as a possible "game changer" in the battle to contain health costs. They don't just slow the increase, they have even rolled back costs for some forward-thinking employers. Learn how clinics a) roll back costs, b) improve care, and c) reduce employee out-of-pocket costs. We will also address common questions about clinics like: Is my company too small? Are we taking on new liability?

Panelists: Ryan Schmid, Vera Whole Health; Marilyn Guthrie, Qliance Medical Management; Dr. David Cameron, Paladina Health; Keith Robertson, Alliant Employee Benefits

RETIREMENT

9:30 am

Retirement Readiness: How are Plan Sponsors, Consultants and Providers Improving Retirement Readiness?

This session will address how to increase employee accountability and engagement with savings plans. We will share innovative ways to discuss how to use technology and data to engage plan sponsors and their participants. Also, learn how a plan sponsor in Bellevue focuses on improving retirement readiness for employees.

Panelists: Phil Mullen, Mercer; Jennifer Scheussler, Empower Retirement; Sheri Rogers, Concur Technologies

10:45 am

Plan Sponsor and Industry Professional: How Do You Know When to Hire an Industry Professional?

How do you know when to hire an industry professional? Three local plan sponsors join us to share their experience. The panel will discuss considerations for determining whether you need the help of a third party industry professional for retirement plan projects such as vendor searches, consultant searches, partial plan terminations, etc.

Panelists: Kevin Hamlet, Sound Family Medicine; Natasha Mielke, Colliers International

1:15 pm

Retirement Party — Enjoy Some Cake and Walk Away with Ideas to Break Out of Your Employee Education Rut!

Education experts on the frontline with retirement plan participants will demonstrate successful techniques and innovative ideas for engaging employees.

Speakers: Dave Shnapek, Sageview Advisory Group; Candy Ihler, Transamerica

2:30 pm

Hot Topics for Investment Committees

What is on the minds of investment committees today? What should your committee be talking about? Join us to hear three investment consultants opine on topics such as the current interest rate environment and fixed income products in retirement plans, new considerations for target date funds and how lifetime income products may play an important role for retirement plans in the future.

Speakers: Juliette de Carteret, Aon Hewitt; David Rowe, Highland Capital Advisors; Jon Chambers, SageView Advisory Group

LEGAL

9:30 am

Managed Investment Products: Legal Changes and Sponsor Considerations

Investment firms have created "outsourced CIO" or "discretionary management" programs designed to replace most of the operations of traditional pension plan investment committees. These investment firms perform an active "management" function — including hiring/firing asset management firms, selecting investment strategies or asset allocation decisions based on parameters established by plan sponsors. This session covers reasons for using this approach— namely refocusing plan governance legal framework/plan governance issues of such arrangements.

Speakers: Jeffrey C. Scott, Wurts & Associates; Les Coughran, McKenzie Rothwell Barlow & Coughran, P.S.

10:45 am

Implementing Seattle's New Minimum Wage Law

What must employers do to comply with the new Seattle minimum wage ordinance? Does the law apply to your company? Are your workers who have offices outside of the city subject to the ordinance if they are required to work in Seattle? How do I calculate an employee's wages? The panel will address these issues and more, both from the perspective of the regulator and from the perspective of companies that have employees in Seattle.

Speakers: Tamara Fountain, Lane Powell PC; Karina Bull, City of Seattle

1:15 pm

Opportunities to Plan for Longevity in DC Plan Designs

With the decline in the number of defined benefit plans, employees need other types of annuity streams to help ensure they do not outlive their retirement income. Recently released regulations provide for annuities in defined contribution plans that may help solve that problem. Join this session for insights from an attorney who is very familiar with the regulations related to QLACs and annuities, to understand the regulations and help you decide whether or not these new alternatives might be right for your company or your clients.

Speakers: Jeff Belfiglio, Davis Wright Tremaine

2:30 pm

Separation Anxiety: Top 10 Issues in Ushering Out Mr./Ms. Big

Employee terminations are difficult and risky, but the stakes are much higher when the employee being terminated is an executive. How do you determine how much separation pay is warranted? What other kinds of benefits should you offer? What are the legal issues that arise in a "typical" executive separation, and how can you minimize the company's legal exposure when drafting a separation agreement? The panel will discuss executive separations both from an economic and a legal viewpoint and will provide practical tips for successfully navigating an executive separation.

Speakers: Katheryn Bradley, Lane Powell PC; Tracey Bean, Mercer

3:45 pm

ALL-MEMBER SESSION: Who's Doing What?

A panel of prominent Northwest employers will share their perspective on the biggest benefits challenges of the day, and how they are simultaneously responding to changes in the retirement and healthcare arenas while also addressing shifts within their industry and business models. Panelists will respond to audience questions and give feedback on ideas raised throughout the day. This interactive session will be a perfect way to close out the conference by bringing together the ideas of what is possible with the practicality of business realities and, ultimately, thriving on change. Panelists include Molly Rudd, Weyerhaeuser Company; Rebecca Brown, Providence; Wendy Rittereiser, Continental Mills; Ellen Stone, Symetra Financial; and Martha Tejera, Tejera & Associates, LLC.

Registration

Register online at www.wpbcseattle.org

When Wednesday, April 22, 2015

Where Bell Harbor International Conference Center
Pier 66, 2211 Alaskan Way

Fees

	Before 4/10	*After 4/10*
Members	255.	395.
Non-Members	355.	495.

Fees includes parking when you park in the Art Institute of Seattle parking garage. Details will be shared with registrants. No refunds after April 15, 2015.

How to Register Online

Go to: www.wpbcseattle.org
Click on "Events" in the blue navigation bar.
Scroll down to "The 2015 Spring Seminar" and follow prompts.

Presentation Handouts

Presentation handouts, as provided by the speaker, will be available to all registered participants via email link to our website prior to April 20.

2015 Sponsors

WP&BC Seattle Chapter gratefully acknowledges the following 2015 sponsors for their support:

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About WP&BC

The Western Pension & Benefits Council is a nonprofit organization focused on education and promoting sound practices in the benefits field.

WP&BC

Western Pension &
Benefits Council
P.O. Box 58530
Seattle, WA 98138-1530

Thriving on Change

at the Spring Seminar, Wednesday April 22, 2015

Thriving on Change

at the 2015 Western Pension & Benefits Spring Seminar

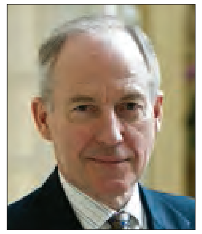
Our industry is experiencing perhaps the most far reaching changes since the implementation of ERISA. We are seeing fundamental shifts in the delivery of health care, innovative approaches to total compensation and major changes in the construct and delivery of employee benefit plans.

The WP&BC Spring Seminar focus is to provide benefits professionals with tools, knowledge and new ideas to help them not only manage through change, but to inspire others and to thrive on change.

Our featured speaker, **Dallas Salisbury,** will offer an up-to-the-minute talk on national legislative and regulatory activity. Dallas Salisbury is President and CEO of Employee Benefit Research Institute. His observations are particularly timely and relevant given the new Republican congress. The Institute provides "just the facts" for objective research, data, education and insight to inform decision making. Dallas will provide his thoughts and observations regarding the issues and trends in both the retirement and health and welfare arenas, with a focus on legislative and regulatory activity.

Our luncheon speaker, **Kevin Carroll,** will present "Rules of the Red Rubber Ball." Kevin Carroll is the founder of Kevin Carroll Katalyst/LLC and the author of three highly successful books. As an author, speaker and agent for social change (a.k.a. the Katalyst), it is Kevin's "job" to inspire businesses, organizations and individuals—from CEOs and employees of Fortune 500 companies to schoolchildren— to embrace their spirit of play and creativity, to maximize their human potential, and sustain more meaningful business and personal growth.

Featured and Luncheon Speakers



Dallas Salisbury

FEATURED SPEAKER
8:15 – 9:15 am

Dallas Salisbury, President and CEO of the Employee Benefit Research Institute, has appeared regularly in the media, including CNN, CNBC, MSNBC, Fox, Fox Business, and PBS. Plan Sponsor Magazine recognizes him as "one of fifteen legends;" 401(k) Wire as "one of the ten most influential" and Pension & Investments as "one of the 30 who have made the most difference to retirement in America."

Kevin Carroll

LUNCHEON SPEAKER
12:00 – 1:00 pm

Kevin Carroll, sponsored by Moda Health with his consulting endeavors, has helped turn creative ideas into reality for organizations such as The National Hockey League, ESPN, Nike, Starbucks (his words appeared on 17 million Grande cups), The National Basketball Association, The Walt Disney Company, Mattel, Hasbro, Procter & Gamble, The Discovery Channel, Capital One, and many others.

In 2014, Kevin joined forces with Moda Health. Brought together by their desire to inspire people to be their healthy best, Moda and Kevin work together, inviting people to celebrate the everyday moments that let them connect, help, relax and play. Because, after a while, these healthy moments add up to a healthy you.

Event Schedule

7:00	Continental Breakfast	11:45	Lunch and Speaker
8:00	General Session	1:15	3rd Session
8:15	Featured Speaker	2:15	Break
9:15	Break	2:30	4th Session
9:30	1st Session	3:30	Break
10:30	Break	3:45	General Session
10:45	2nd Session	4:45	Adjourn