



The Pacific Northwest Chapter of the
International Society of
Certified Employee Benefit Specialists



2019 Legal & Legislative Update for Retirement Plans

Thursday, November 21, 2019 | 11:45 – 1:00 Pacific

Via Webinar

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The Supreme Court’s next term looks to be flush with ERISA issues. They’ve agreed to review a Ninth Circuit case alleging that fiduciaries breached their duties by making imprudent investments and charging excessive fees. Plus there are two other cases that they will review, with the potential that more will be added, which center around fiduciary duties, disclosures, investment options, and fees. This webinar will cover these cases, an update on the current defined benefit cases on actuarial equivalency and defined contribution fee cases, plus any new regulatory guidance on retirement plans issued in the second half of 2019. As time permits, our speakers will also look into their crystal ball to provide an update of potential legislative changes and other cases to watch that might be taken up by the Supremes in the future.

Top Take Aways:

- Status of federal ERISA legislation
- Lessons from new ERISA decisions
- U.S. Supreme Court Cases to watch

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Speaker: Bethany A. Bacci, Partner | Stoel Rives LLP | Portland, OR

Bethany counsels public and private employers on compliance for the full range of employee benefit programs and on plan design. This includes qualified and nonqualified retirement plans, health and welfare programs, fringe benefit programs, and executive compensation arrangements. In an evolving regulatory environment, Bethany partners with clients to stay on top of legal developments and current industry trends, such as pension derisking and self-funding health benefits. She represents plan sponsors in devising, negotiating, and implementing changes to employee benefit programs to address tax qualification issues, align plan design with business objectives, and mitigate risk through use of the IRS and Department of Labor correction procedures. Bethany has extensive experience assisting clients in corporate transactions with identifying potential liabilities, analyzing opportunities for synergy and creating employee communication strategies. She regularly handles plan spinoffs and mergers. In addition, Bethany advises clients on multiemployer plan withdrawal liability issues and successor liability.

When not focusing on her benefits practice, Bethany serves as a member of Stoel Rives' Pro Bono Committee and represents pro bono clients on a variety of issues through the Stoel Rives night clinic run in partnership with Multnomah County Legal Aid. She previously won the firm's pro bono award in recognition of her service.

Speaker: Abbey L. Hendricks, Associate | Stoel Rives LLP | Portland, OR

Abbey assists clients with a broad range of employee benefits issues, including issues associated with qualified retirement plans, nonqualified deferred compensation plans, and health and welfare benefit plans. She appreciates the value employers receive by offering these plans to their workforce and helps employers ensure compliance with numerous legal obligations.

Prior to starting her law practice, Abbey worked for public and private employers in human resources and employee benefits. She previously served as plan administrator for fully-insured and self-funded employer sponsored health plans, collaborated with labor relations representatives on collectively-bargained employee benefits, and oversaw the design and operation of ancillary health and welfare benefits. She applies this experience to work with clients in a variety of industries. Abbey attained her CEBS designation in 2009.

When she's not focusing on her benefits practice, you may see Abbey out exploring the beauty of the Pacific Northwest.