

Agenda

Executive Roundtable Group
Thursday, September 29, 2022
9:00am – 10:30am

Please join us virtually on **Zoom Webinar**.
See information on bottom of page two to register.

Introductory Welcome

Alan Pfeffer, Senior Vice President - Sentinel Benefits & Financial Group

Employment Update

Kimberly Malerba, Partner - Ruskin Moscou Faltischek P.C.

- Notice of electronic monitoring
- Pay transparency law
- COVID update

Findings On IRS Examinations Of Retirement Plans

Lou LiBrandi, Principal - PKF O'Connor Davies

- Plan Document Issues
- Operational Issues – Self-Correction, VCP, Negotiations

ERISA Plan Governance

John Shillingsford, PKF O'Connor Davies

- Importance and frequency of Governance Committee Meetings (Trustees, or the Equivalent)
- Importance of ERISA counsel and or independent Fiduciary
- Corrective actions on management comment letters



Combining Health & Wealth To Better Your Workforce And Create Efficiencies

Alan Pfeffer, SVP and Gregory Puig, VP, Benefit Consulting Services - Sentinel Benefits & Financial Group

- Join us for an in-depth session on the best ways to combine the Insurance and Retirement Plan “silos” and how to administer and educate your benefit plans holistically
 - Discuss the positive long-term benefits of combining your Health & Wealth efforts
 - Explain the administrative efficiencies combining these two offerings can allow
 - Discuss technology solutions many of our clients are leveraging to engage and educate their respective workforces on both benefits
 - Game plan how to educate your participant base holistically

Closing Comments and Q&A

Alan Pfeffer, Senior Vice President - Sentinel Benefits & Financial Group

Register on the link below for Zoom Webinar:

https://sentinelgroup.zoom.us/webinar/register/WN_3y8TuJYhSK-Ttp6j-6cmaA

