

2022 National Training Conference
U.S. Administration on Aging – Administration on Community Living
Pension Counseling and Information Program
Remote Agenda

We will have one Zoom link for the entire conference. The link is:

Join Zoom Meeting:

<https://us06web.zoom.us/j/3258126192?pwd=MVRMWdJqSUJOUkFkdEJrTDJ0dFB3QT09>

Meeting ID: 325 812 6192

Passcode: 401019

We look forward to seeing everyone!

Monday, September 12th

1:00 –1:30 PM EST

Session Topic: *Introductions to the National Training Conference*

Speakers: **Hilary Dalin**, Director, Office of Elder Justice and Adult Protective Services, ACL
Aiesha Gurley, Aging Specialist, Office of Elder Justice and Adult Protective Services, ACL
Jeremy Bell, Aging Specialist, Office of Elder Justice and Adult Protective Services, ACL

Moderator: **Raechel Parolisi**, Legal Director, Pension Rights Center

1:30 –2:30 PM EST

Session Topic: *Department of Labor Session*

Discussion of current EBSA issues and priorities. This will also be an opportunity for us to discuss what we do and to engage in a back and forth on Departmental issues and concerns.

Speakers: **Ali Khawar**, EBSA Acting Assistant Secretary
Tim Hauser, EBSA Deputy Assistant Secretary for Program Operations

Moderator: **Raechel Parolisi**, Legal Director, Pension Rights Center

3:00 – 4:00 PM EST

Session Topic: DOL Benefit Advisor Session

This will be an interactive session focused on learning how project attorneys and EBSA benefit advisors can work together to best serve clients. During this session, attorneys will learn when they should reach out to benefit advisors for assistance.

Speakers: **Lauren Poland**, Senior Benefits Advisor, Cincinnati Regional Office
Sindy Baldayaque, Senior Benefits Advisor, New York Regional Office

Moderator: **Raechel Parolisi**, Legal Director, Pension Rights Center

2021 National Training Conference
U.S. Administration on Aging – Administration on Community Living
Pension Counseling and Information Program
Remote Agenda

Tuesday, September 13th

Join Zoom Meeting:

<https://us06web.zoom.us/j/3258126192?pwd=MVRMWDJqSUJOUkFkdEJrTDJ0dFB3QT09>

Meeting ID: 325 812 6192
Passcode: 401019

12:00PM-1:00 PM EST

Session Topic: PAL and Derisking Session

Steve Alpert will describe the American Academy of Actuaries Pension Assistance List (“PAL”), which is a program in which volunteer actuaries provide pro bono assistance to individuals, including participants in pension plans. Steve and Norman will provide an overview of pension plan derisking and how such actions impact participants.

Speakers: **Steve Alpert**, Former President of the American Academy of Actuaries
Norman Stein, Senior Policy Advisor to Pension Rights Center

2:00PM-3:00 PM EST

Session Topic: Railroad Retirement Board Benefits

Dr. Sass will provide an overview of the railroad retirement system, in which he will discuss the origins, evolution and current structure of the railroad retirement system. Matt Morley will discuss the system’s benefit structure and some common legal issues, particularly issues involving spousal benefits and rights.

Speakers: **Matt Morley**, Attorney, KLM Attorneys, LLC
Dr. Steven Sass, Research Fellow for the Center for Retirement Research at Boston College

Moderator: **Norman Stein**, Senior Policy Advisor to Pension Rights Center

2021 National Training Conference
U.S. Administration on Aging – Administration on Community Living
Pension Counseling and Information Program
Remote Agenda

Wednesday, September 14th

Join Zoom Meeting:

<https://us06web.zoom.us/j/3258126192?pwd=MVRMWdJqSUJOUkFkdEJrTDJ0dFB3QT09>

Meeting ID: 325 812 6192

Passcode: 401019

1:00 –1:30 PM EST

Session Topic: ***Nuts and Bolts Part I – Form Assembly***

Chris Mullen will discuss how to use Form Assembly to auto-populate Justice Server and ways to make client intake easier.

Speakers: **Chris Mullen**, CRM Administrator, University of Massachusetts Boston

2:00 –3:30 PM EST

Session Topic: ***PBGC Plan Takeovers and Coffee with Connie and Camille!***

This session will begin with an explanation of what occurs when the Pension Benefit Guaranty Corporation takes over a plan. At the end of the session, there will be an informal discussion, “Coffee with Connie and Camille!”

Speakers: **Camille Castro**, Senior Associate Participant and Plan Sponsor Advocate at Pension Benefit Guaranty Corporation
Terry Deneen, Michael Gordon Fellow, Pension Rights Center
Constance A. Donovan, PBGC Participant and Plan Sponsor Advocate
Anne Henderson, Senior Advisor, Office of Policy and External Affairs
Suzanne LaPiana, Senior Advisor to Participant Services Department Director (PSD)
Susan Strassman, Senior Advisor to the Chief of Benefits Administration (CBA)

Moderator: **Raechel Parolisi**, Legal Director, Pension Rights Center

4:00 –5:00 PM EST

Session Topic: ***Nuts and Bolts Part II – Blogs, Videos and More***

In this part of Nuts and Bolts we will discuss ways in which PRC can help with the projects' websites, outreach and fundraising. We will examine how PRC can showcase the projects and their cases

Speakers: **David Brandolph**, Senior Communications Consultant
Kate Pixley, Communications & Program Associate

2021 National Training Conference
U.S. Administration on Aging – Administration on Community Living
Pension Counseling and Information Program
Remote Agenda

Thursday, September 15th

Join Zoom Meeting:

<https://us06web.zoom.us/j/3258126192?pwd=MVRMWdJqSUJOUkFkdEJrTDJ0dFB3QT09>

Meeting ID: 325 812 6192

Passcode: 401019

1:00PM – 2:30PM

Session Topic:

Retirement Benefits and Federal Tax Issues

In this session, common tax issues that pension clients may experience will be discussed. An overview of relevant tax provisions will be presented. In addition, Required Minimum Distributions (RMDs) and the tax consequences for failing to take them will be covered.

Speakers:

William Bortz, Michael Gordon Fellow, Former Associate Benefits Tax Counsel at the U.S. Department of the Treasury

Sarah Dranoff, Director, Workers' Rights and Benefits Unit, Brooklyn Legal Services

Anna Tavis, Staff Attorney, Brooklyn Legal Services

Moderator:

Raechel Parolisi, Legal Director, Pension Rights Center

3:00 – 4:00 PM EST

Session Topic:

Regulatory & Legislative Update

This session will address legislative and regulatory issues as they affect clients. There will be an explanation of relevant provisions of the bi-partisan pension reform legislation called the Securing a Strong Retirement Act (SECURE 2.0), as well as Thrift Savings Plan regulations, IRS spousal consent requirements and deferred vested statements. Updates on the Butch Lewis Act will also be covered.

Speakers:

Debbie Chalfie, Volunteer Attorney, Pension Rights Center

Terry Deneen, Michael Gordon Fellow, Pension Rights Center

Jane Smith, Policy Analyst, Pension Rights Center

Moderator:

Karen Friedman, Executive Director, Pension Rights Center

2021 National Training Conference
U.S. Administration on Aging – Administration on Community Living
Pension Counseling and Information Program
Remote Agenda

Friday, September 16th

Join Zoom Meeting:

<https://us06web.zoom.us/j/3258126192?pwd=MVRMWdJqSUJOUkFkdEJrTDJ0dFB3QT09>

Meeting ID: 325 812 6192

Passcode: 401019

1:00 – 2:30 PM EST

Session Topic: Case Law Update

Speaker: Radha Pathak, Partner, Stris & Maher LLP

3:30 – 5:00 PM EST

Session Topic: Case Sharing

Speakers: Counseling Project Attorneys
Roger Curme (1 case)
Christine Steinmetz (2 cases)
Martin Bolt (3 cases)
AnnaMarie Tabor (1 case)
Madeline Tabor (1 case)
Madeleine Tabor and Norman Stein (1 case)