CBA Church Benefits Association

2015 ANNUAL MEETING

December 1–3, 2015 • Hyatt Regency Baltimore

BALTIMORE, MD

REGISTRATION BROCHURE

LETTER FROM THE CBA PLANNING COMMITTEE CHAIR

Welcome to Baltimore!

On behalf of the Church Benefits Association Planning Committee, I want to extend our welcome to you as we visit Baltimore one more time. While you may have attended previous CBA meetings in Baltimore, our hope is that you will take a little extra time to enjoy this beautiful city during your visit. We will not be back to this area for a meeting for many years to come, so take in the beautiful sights and the delicious food of Baltimore's Inner Harbor with one of your CBA colleagues. Enjoy the sights, the food, and the fellowship.

Most importantly, come to Baltimore with a sense of expectancy. The Planning Committee has been working for the past year to provide for you the best CBA Annual Meeting ever. Whether you are a new participant in the Annual Meeting or you have been coming for years, we believe that the speakers and breakout times will challenge you.

In an effort to convey as much information as possible during the meeting, you will find that some sessions have been shortened and others have been added. In addition, we have included specific times for networking. So come prepared to expand your horizons.

The Planning Committee and I look forward to seeing you in Baltimore for the 101st Annual Meeting of the Church Benefits Association.

Art Rhodes, Chair

Planning Committee

Church Benefits Association

Tuesday, December 1, 2015

9:00 am–11:00 am **Church Alliance Steering Committee Meeting**

9:00 am–6:00 pm **Sponsor Table Tops**

9:15 am–1:45 pm **Pre-Meeting Vendor Meetings**

9:15 am–10:15 am	Highmark
10:30 am–1:45 pm	Express Scripts Inc.
10:30 am–1:45 pm	Catamaran

11:30 am–1:00 pm **CFOs/CIOs**

(Open to CFOs and CIOs Only)

Session Description: This session will be conducted as an open roundtable discussion between the CFOs and CIOs.

11:30 am–2:30 pm **CEO Breakout Session and CBA/Church Alliance Business Meetings**

(Open to CEOs Only)

Session Description: The session will focus on strategic thinking about future trends for the CBA. The basis for the conversation will be the results of the SWOT survey distributed to the Chief Executives of the member organizations earlier this year.

Speaker: Don L. Walter, Director, Church of the Nazarene - Global Ministries Center

Biography: Don Walter is director of Pensions and Benefits USA for the Church of the Nazarene in Lenexa, Kansas. He became director in 1994 after having served in various roles in the office since 1983. Pensions and Benefits USA provides retirement assistance, life and disability insurance, emergency medical assistance, and informational services on taxation, compensation, and other financial matters that affect some 14,000 active and retired Nazarene clergy and their churches. He is past-president of the Church Benefits Association (CBA), and has been instrumental in creating and growing the CBA mid-plans special interest group which includes benefit administrators from nearly 20 denominations managing plans with assets of less than $1 billion.

1:00 pm–2:30 pm **Information Technology Pre-Meeting Session**

Session Description: The purpose of the IT committee is to leverage our business and technology experience and knowledge to better support the missions of our organizations. This session is a forum for sharing ideas and information pertaining to current initiatives, discussing and evaluating technological trends and innovations that add value, and soliciting outside experience to further augment our knowledge in new and emerging technologies relevant to our operations.

Moderator: Tom M. Drez, CIO/CPO/CSO/Managing Director, Christian Brothers Services

Biography: Tom Drez serves as Chief Information Officer and Managing Director of the Information & Technology Services (ITS) Division of Christian Brothers Services (CBS). Tom joined CBS in 1987 to lead the division and take on the responsibility to strategically apply information technology to the business as an enabler to achieve desirable results. The ITS Division provides for operations, software and website design and development, and education. This includes responsibilities for implementing, supporting, and maintaining all aspects of computer, telephone, and audio/visual systems ensuring that

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technology usage fully supports organizational goals. He also has responsibility for information protection including privacy and security. Tom holds a Bachelor of Arts degree in Computer Science from Lewis University along with the designation of Certified Information Privacy Professional (CIPP) from the International Association of Privacy Professionals. He is chairman of the Church Benefits Association's Information Technology Group as well as a member of the Diocesan Information Systems Conference (DISC) and member of the Lewis University Computer Science Advisory Board. Tom resides in Lemont, Illinois with his wife, Carrie, and three children, and is active member of the community. He is Past President of the Lemont Lions Club, Cabinet Secretary for the District 1-B Lions, and Information Technology Chairman for the Lions of Illinois.

1:30 pm–2:30 pm Trustee Session

Session Description: This session will allow Trustees to discuss best practices and best "ideas" with their fellow colleagues. Trustees should come prepared to participate in an open forum on how to better serve their plans and the staff that manage those plans.

Speakers: Arthur D. Rhodes, CBA Planning Committee Chair, President & CEO, Church of God and Jeffrey D. Thiemann, President and CEO, Portico Benefit Services, a ministry of the Evangelical Lutheran Church in America and Dianne Witte, Associate Director, Principal Gifts, Office of Development, Yale University

Biography: Arthur D. Rhodes was named President and Chief Executive Officer of the Church of God Benefits Board, Inc. in Cleveland, Tennessee in February 1999. In addition, in 2010 Art also became the President and Chief Executive Officer of the Church Loan Fund, Inc.

The son of a minister, Art was reared in the state of Mississippi and graduated from Millsaps College and the University of Mississippi School of Law. During his career, Art served as counsel for the Mississippi State Department of Public Welfare, and in private law practice, he specialized in construction litigation. Prior to coming to the Board, Art served more than a decade as Chief of Staff, legal counsel, and as an advisor on legislative matters to United States Rep. Mike Parker (R - 4th, MS). Through the years, Art has maintained a keen interest in politics, having served as an election observer in the contested Florida presidential election in November 2000 and as a member of the RNC's Legal Strike Force during the election cycles over the past dozen years.

Art and his wife, Angie, make their home in Cleveland, Tennessee, with their two children, Katelyn (a senior at Bradley Central High School) and Taylor (a junior at the University of Southern Mississippi).

Biography: The Rev. Jeffrey Thiemann began his term of office as President and CEO of Portico Benefit Services on October 1, 2011. Pr. Thiemann serves on the Board of Directors of the Church Benefits Association, which promotes excellence for church benefit plans through nonpartisan education, collaboration and fellowship. He is on the Steering Committee of the Church Alliance, a coalition of CEOs of 38 church benefit programs to ensure that benefit-related legislative and regulatory initiatives fully address the unique nature of church plans.

Pr. Thiemann was executive pastor at Saint Matthew Lutheran Church in Walnut Creek, California. Prior to answering a call to ordained ministry, Thiemann worked in a variety of business settings that included technical, marketing and executive management and leadership roles. He consulted to startups in Silicon Valley, was President and CEO of a startup and spent nearly 20 years at Hewlett-Packard Co., in global assignments and management positions.

Pr. Thiemann earned a bachelor's degree in computer science engineering in 1980 from Massachusetts Institute of Technology in Cambridge, Mass. He is a 1997 graduate of Harvard Business School's The General Manager

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Program, Executive Education, in Boston. He received his Master of Divinity in 2005 from Pacific Lutheran Theological Seminary in Berkeley, Calif.

Jeff and his wife, Pam, have four children and one grandson. He and his wife reside in Plymouth, Minnesota and are members of Lord of Life Lutheran Church in Maple Grove, Minnesota.

Biography: Dianne Witte, New Haven, Conn.
Employment: Associate Director, Principal Gifts, Office of Development, Yale University, New Haven, Conn.
Congregation: Bethesda Lutheran Church, New Haven, Conn.
Boards and Committees:

- Secretary of the Board, Connecticut Food Bank
- Chair of Board Development Committee, Portico Benefit Services Board of Trustees

3:00 pm–3:05 pm Welcome

Speaker: Arthur D. Rhodes, CBA Planning Committee Chair, President & CEO, Church of God

Biography: See page 4

3:05 pm–3:15 pm Opening Devotional

Speaker: Frank C. Spencer, Reverend, the Board of Pensions of the Presbyterian Church (USA)

Biography: The Reverend Frank Clark Spencer leads a team of 185 professionals who provide a comprehensive set of benefits to ministers and employees who serve the Presbyterian Church (USA). Rev. Spencer brings a unique perspective to service and leadership. He has applied his diverse talents in the fields of investment management, employee benefits, finance, real estate, affordable housing, Christian conferencing, and public policy. A dedicated scholar, teacher, author, entrepreneur and speaker, Frank has guided organizations of all types in synthesizing strategy, values and implementation. As President and then CEO, he led Cogdell Spencer Inc. to national prominence in healthcare real estate, culminating in an Initial Public Offering on the New York Stock Exchange (NYSE). While pursuing his studies at Union Presbyterian Seminary, Frank served as President and CEO of Habitat for Humanity of Charlotte. He has been named a Morehead Scholar (UNC), a Baker Scholar (Harvard), and received the Presidential Service and Leadership Award (Union). In 2009, Ernst and Young named him Entrepreneur of the Year in the Carolinas.

3:15 pm–3:45 pm Washington Update

Speaker: Andrew Hendren, General Counsel, General Board of Pension & Health Benefits of The United Methodist Church

Biography: Mr. Hendren is General Counsel for the General Board of Pension and Health Benefits (GBPHB) of The United Methodist Church. He is responsible for providing legal advice to the GBPHB, its board of directors and its officers. He manages a staff of in house lawyers who assist in educating certain other entities associated with The United Methodist Church in employee benefits and investments matters. His primary areas of expertise are employee benefits law, health care law and tax law, but he also practices general corporate (nonprofit) law. He is the Secretary and Treasurer of the Church Alliance, an ecumenical coalition of CEOs of 37 church benefit programs and leads its Core Lawyer Working Group. Before joining the GBPHB, Mr. Hendren practiced employee benefits law at the Chicago-based law firm of Sidley Austin LLP from 2001 to 2004. Before that, he clerked for the Honorable Chief Justice William Ray Price on the Supreme Court of Missouri from 2000 to 2001. Mr. Hendren has a J.D. from the University of California at Berkeley Boalt Hall School of Law, an M.S. in Economics from Iowa State University, and a B.A. in Economics from Truman State University.

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3:45 pm–4:45 pm CBA Report of Significant Developments

Speaker: Jeffrey D. Thiemann, President and CEO, Portico Benefit Services, a ministry of the Evangelical Lutheran Church in America

Biography: See page 4.

4:45 pm - 5:00 pm New Member and First Time Attendee Orientation

Session Description: Welcomes new members and first time attendees to the annual meeting. This session is an overview of the Church Benefits Association (CBA) and The Church Alliance. CBA also has committee members available for questions about the committees.

Speakers: Barbara A. Boigegrain, Church Alliance Chair, General Secretary and CEO, General Board of Pension and Health Benefits of The United Methodist Church and James P. Hamlett, CBA Board Chair, President, Christian Church (Disciples of Christ) and Arthur D. Rhodes, CBA Planning Committee Chair, President & CEO, Church of God

Biography: Barbara A. Boigegrain has served The United Methodist Church as general secretary of the General Board of Pension and Health Benefits since August 1994. This agency is responsible for the general supervision and administration of the retirement, health and welfare benefit plans and programs for more than 91,000 active and retired clergy and lay employees of the Church. As general secretary, Barbara oversees the fiduciary and investment services of the General Board including its 20-billion dollar investment portfolio of assets under management. Prior to joining the General Board, Barbara enjoyed an eleven-year consulting career with Towers Perrin, a global human resources management consulting firm.

She established the company's San Diego office in 1990 and managed a broad client base, including many of the area's leading corporations and nonprofit organizations.

Earlier in her career, Barbara focused on group insurance benefits with Los Angeles-based Dart Industries and consulted in the KPMG Peat Marwick tax practice.

Barbara is engaged with a number of professional associations, among them: Church Benefits Association: Board Chair (past); The Church Alliance: Chair and Steering Committee Member; and First Midwest Bancorp, Inc.: Board Member.

Biography: James P. Hamlett serves as President of the Pension Fund of the Christian Church, a position he has held since January 1, 2004. Mr. Hamlett joined the staff of the Pension Fund as Vice-President/President-elect in 2001. Prior to his coming to the Pension Fund, Mr. Hamlett served for more than 28 years on the staff of the Board of Church Extension, most recently as Vice President, Chief Financial Officer and Treasurer.

Mr. Hamlett holds a B.A. in Economics from the University of Kansas, an MBA in Finance from Indiana University and, Chartered Financial Consultant (ChFC®), Certified Life Underwriter (CLU®), Chartered Advisor for Senior Living (CASL®) and Retirement Income Certified Professional (RICP®) designations from The American College.

The Pension Fund of the Christian Church (Disciples of Christ) serves the financial needs of ministers and lay employees of the Church through the Pension Plan, tax deferred and after tax retirement savings, Churchwide Health Care, dental insurance, accident Insurance, retirement planning and ministerial relief and assistance programs. The Pension Fund manages assets in excess of $3 billion on behalf of Plan members and program participants. It is one of ten General Units of the Christian Church (Disciples of Christ).

Biography: Arthur D. Rhodes, see page 4.

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4:45 pm–6:00 pm **Sponsor Networking**

6:00 pm–9:30 pm **Transportation to Networking Dinner**

A continuous shuttle will be offered throughout the night starting at 6:00 pm to the American Visionary Art Museum. Last shuttle will leave the museum at 9:30 pm to return to the Hyatt Regency Baltimore**.** Attendees can also walk there. The museum is a 13-minute walk from the hotel. Click here for walking directions.

6:15 pm–9:30 pm **Networking Dinner at the American Visionary Art Museum, Jim Rouse Visionary Center (JRVC)** ***(Offsite)***

7:30 am–8:00 am **Coffee Service**

9:00 am–5:00 pm **Sponsor Table Tops**

8:00 am–8:35 am **Opening Devotional**

Speaker: The Honorable Gregory Harper, United States House of Representatives, Mississippi's 3rd District

Biography: Gregg Harper is currently serving his fourth term in the U.S. House of Representatives after having been first elected to Congress in November of 2008.

Mississippi's Third Congressional District stretches from Wilkinson County to Oktibbeha County and includes the northeast corner of Jackson and the I-20 corridor into east central Mississippi.

Gregg has lived in Mississippi's Third Congressional District since 1972 and currently resides in Pearl with his wife of 35 years, Sidney, and their two children, Livingston and Maggie. The Harpers are active members of Crossgates Baptist Church in Brandon, Mississippi.

The son of a former petroleum engineer and a mom who worked two days a week until she was 88 years old, Gregg learned at a young age the value of hard work and the importance of a solid education. Gregg and Sidney are both graduates of Mississippi College where he majored in Chemistry. He then earned his law degree from the University of Mississippi School of Law in 1981.

Prior to his service in Congress, Gregg practiced law for twenty-seven years, including serving as the prosecuting attorney for the cities of Brandon and Richland. He also served on the Mississippi Oil and Gas Board, and remains active in his community as a member of both the Pearl and Rankin County Chambers of Commerce.

In Congress, Gregg serves on the influential House Committee on Energy and Commerce, where he is a member of three subcommittees: Environment and the Economy; Commerce, Manufacturing and Trade; and Energy and Power. Gregg serves as the vice-chairman of the Subcommittee on Environment and the Economy.

The state's senior House Republican also sits on the select Committee on House Administration, a special appointment made by House Speaker John Boehner. Additionally, Gregg serves on the Joint Committees on the Library of Congress and Printing.

8:35 am–9:40 am **Investment Plenary**

Session Description: Investment Management: A 35 Year Perspective from Brian Rogers, Chairman, T. Rowe Price Brian will be interviewed by Judith D. Freyer, with questions from CBA attendees.

Moderator: Judy Freyer, Senior Vice President, Treasurer and Chief Investment Officer, Board of Pensions of the Presbyterian Church (U.S.A.)

Speaker: Brian C. Rogers, Chairman of the Board & Chief Investment Officer, T. Rowe Price Group

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Biography: Judy Freyer is the Senior Vice President, Treasurer and Chief Investment Officer of the Board of Pensions of the Presbyterian Church (U.S.A.) She has investment oversight for $9.5 billion in assets that support the defined benefit pension plan and other plans and programs of the denomination. Prior to joining the Board of Pensions in 1988, Judy worked for twelve years at UGI Corporation in finance and investor relations.

Judy currently serves on the Board of Directors of the William Penn Foundation and chairs the Investment Committee. She chairs the MMBB Financial Services Investment Committee of the American Baptist Church. She is a member of the Executive Board and has chaired the Investment Committee of the Cradle of Liberty Council, Boy Scouts of America since 1991. She is a member of the Investment Committee of the Library Company of Philadelphia.

Judy received her B.A. from Manhattanville College, M.A. in economic history from the University of Pennsylvania, and M.B.A. from Boston University. She was a Woodrow Wilson Fellow in history and economics in 1970 and is a CFA charterholder.

Biography: Brian C. Rogers is Chairman of the Board and Chief Investment Officer of T. Rowe Price Group. Brian serves as President and Chairman of the Investment Advisory Committee of the $26 billion Equity Income Fund and manages related institutional portfolios. Brian has 35 years investment experience, 33 of which have been at T. Rowe Price.

Mr. Rogers serves as a trustee for John Hopkins University and John Hopkins Medicine, and is a member the university's investment committee. He is a member of the Maryland Economic Development Commission, chairman of the Archdiocese of Baltimore's finance committee and a member of the investment committee for Vanderbilt University. In addition, he is the past chairman of the Archdiocese of Baltimore's Independent Review Board and former chairman of the Greater Baltimore Committee. He has served on the boards at Gilman School and Roland Park Country School.

Mr. Rogers earned an A.B. in Economics from Harvard University and an M.B.A. in Finance from Harvard Business School. He is accredited as a Chartered Financial Analyst and as a Chartered Investment Counselor.

9:40 am–10:00 am Networking Break

10:00 am–11:05 am Health Care Plenary

Session Description: This session will review the state of the U.S. group and individual insurance marketplace, along with an inventory of market and regulatory trends reshaping healthcare delivery.

Speaker: Michael Turpin, Executive Vice President, Managing Consultant, USI Insurance Services

Biography: Michael Turpin brings over 30 years' experience in benefits and business insurance brokerage and consulting. Mike started his career with the brokerage firm Johnson & Higgins and served in local, regional and national roles in Los Angeles, Newport Beach, San Francisco, and New York.

In 2000, Mike was promoted to run the Middle Market benefits and property casualty practice in Europe and the Middle East - based in London. In this role, he was exposed to a range of national healthcare structures and gained invaluable expertise in understanding the strengths and weaknesses of these systems.

In 2003, Mike relocated back to New York and accepted a role as global practice leader with Mercer, a division of Marsh.

In 2005, he accepted an offer from United Healthcare (UHC) to become President of Key Accounts for the U.S. and was ultimately promoted to become CEO of the Northeast region, UHC's largest retail business with over $8B in medical spendings.

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In 2008, Mike came to USI as a corporate EVP responsible for the U.S. benefits strategy, operating structure, people and processes. Mike is a published author, weekly columnist for the New Canaan News Review, frequent speaker and pundit opining on issues relating to health care reform, employee benefits, and business insurance issues. He is a tireless advocate for children's health and public health improvement, and has served in a variety of board capacities for teen centers and children's educational institutions.

Mike is a graduate of Claremont McKenna College where he majored in literature and minored in business. He is married with three children and lives in New Canaan, Connecticut.

11:05 am–11:15 am Transition Break

11:15 am–12:15 pm Topical Interest Breakout Session #1

Church/Synagogue Relations Committee and Health & Wellness Committee: Regarding Low Retirement Amounts

Session Description: A "world café" discussion including theological reflection, with a focus on causes and adaptive changes needed to deal with low retirement amounts.

Moderators: Rev. Harold L. Usgaard, Assistant to the President for Church Relations, Portico Benefit Services/ A Ministry of the ELCA and Tammy Devine, Diaconal Minister, and ELCA Wellness Manager, Portico Benefit Services, a Ministry of the ELCA

Biography: Harold Usgaard accepted the call to join Portico as the Assistant to the President for Church Relations in September 2013. In this role, Huck works to enhance and expand Portico's relationships with its partners in ministry, providing insight into the perspectives of church leaders and plan members. Huck is Bishop Emeritus of the Southeastern Minnesota Synod, having served two six-year terms between 2001 and 2013. Prior to his call as bishop, he served as a pastor at St. Olaf Lutheran Church in Austin, Minnesota; at Mount Hope Lutheran Church in West Allis, Wisconsin; and at Zumbro Lutheran Church in Rochester, Minnesota. He holds degrees from Luther College and Luther Seminary, and was ordained a pastor in 1973. In the past, Huck served on the Board of Regents for both Luther College and Augsburg College, and as a member of the task force which created the ELCA social statement, Our Calling in Education. He also served on the state board of Lutheran Social Services of Minnesota, the executive committee of the Minnesota Council of Churches and as a liaison bishop to the ELCA Church Council. Huck and his wife, Lynette, live in Rosemount, Minnesota. They are proud parents to three grown children and two grandsons.

Biography: Tammy Devine is a diaconal minister, and Wellness Manager for the Evangelical Church in America, serving through Portico Benefit Services.

Tammy is a strategic and systemic whole person promoter of well-being, through education and inspiration throughout the ELCA. Devine collaborates with thought leaders to facilitate and motivate whole person lifestyle choices and serves as an external wellness consultant and coach to integrate well-being throughout the ELCA.

Devine is a registered nurse, (BA, Augustana College, Sioux Falls), a Master's in leadership from Luther Seminary. She has completed preparation as a parish nurse/ coordinator, and spiritual coach.

Health Benefits Committee: Legislative and Regulatory Update

Session Description: This session will provide an update on the Affordable Care Act (Healthcare Reform), along with other regulatory and legislative activity of interest to church plans.

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Moderator: Melodie Powers, Director of Large Employer Resources, Concordia Plan Services, The Lutheran Church – Missouri Synod

Speakers: Jean Hemphill, Partner, Ballard Spahr and Ann Stillman, Vice President and General Counsel, Concordia Plan Services

Biography: Jean C. Hemphill is the Practice Leader of Ballard Spahr's Health Care Group. Ms. Hemphill concentrates on general corporate, health care, employee benefits, and nonprofit law. She represents academic medical centers, medical schools, health systems, physician practice groups, clinical laboratories, social service agencies, pension and welfare plans, employers, business groups, and other entities involved in health, retirement, and social service issues. Before joining Ballard Spahr in 1997, Ms. Hemphill was Vice President and General Counsel of the Board of Pensions of the Presbyterian Church (U.S.A.). She continues to serve as General Counsel for the Board and as legal counsel to numerous other denominational benefits programs. Ms. Hemphill is a frequent lecturer on health, employee benefits, and nonprofit law subjects, including most recently the Patient Protection and Affordable Care Act, Medicare Part D compliance, HIPAA privacy and security matters, fraud and abuse, compliance, fiduciary duties of directors and officers, and other governance issues for tax-exempt organizations.

Biography: Melodie Powers started working at Concordia Plan Services in 2005 as the Director of Health Plans and Services and currently serves as Director of Large Employer Resources. Prior to joining Concordia, she worked in the insurance industry with carriers such as Delta Dental of Missouri, Blue Cross Blue Shield of Missouri and Pennsylvania Blue Shield. Currently she serves on the Steering Committee for the St. Louis Chapter of Worldwide Employee Benefits; belongs to the Employee Benefits Association and International Foundation of Employee Benefit Plans; and is past-President and member of the Board of Directors for the St. Charles Humane Society. Her volunteer activities include advocating for companion animal welfare. Melodie earned a Master's Degree in Human Resources from Webster University; a Bachelor's Degree from Washington University in St. Louis majoring in Industrial and Organizational Psychology with a minor emphasis in Communications and Journalism; and is a licensed life, accident and health producer in the State of Missouri. Melodie has three adult sons and two grandchildren.

Biography: Ann Stillman has served as General Counsel of Concordia Plan Services since 2011. Concordia Plan Services administers the employee benefit plans for the workers of The Lutheran Church—Missouri Synod, its congregations and affiliated organizations. Prior to serving as General Counsel, Ann worked for 25 years in private practice for a variety of tax-exempt organizations and church plans, including Concordia Plan Services.

Investments Committee: Investments

Session Description: This session will be conducted as an open roundtable discussion where participants will exchange information regarding various investment topics of interest to those involved in managing, administering, and fiduciary oversight of investment programs to support retirement plans. The session will be moderated with various topics that include asset/liability management, new asset classes, socially responsible investing practices, investment manager selection, alternative investments, best practices for fiduciaries, participant fund options, and various other investment topics of interest to those attending the discussion.

Moderator: David Zellner, Chief Investment Officer, General Board of Pension and Health Benefits of The United Methodist Church

Biography: Dave Zellner is the Chief Investment Officer for Wespath Investment Management, which is a division of the General Board of Pension and Health Benefits of the United Methodist Church in Glenview, Illinois. Wespath

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currently manages $20 billion of participant and UMC-affiliated institutional assets and provides benefits to approximately 91,000 active and retired lay and clergy employees of The United Methodist Church and its affiliated agencies. Before assuming his current position in 1997, Dave was a Senior Vice President and Director of Operations with Investment Research Company, then an investment management affiliate of United Asset Management. Previously, he was Director of Equities for the Shell Oil Company Retirement Funds where he managed two internal investment portfolios.

Dave helped co-author and was one of the original signatories to the United Nations Principles for Responsible Investment in 2006. He serves on the board of directors for the Capital Guardian Emerging Markets Growth Fund. He received his B.S. in Finance from Louisiana State University and MBA from the University of Houston.

Retirement Benefits Committee: Legal Update on Issues Affecting Retirement Plans

Session Description: This session will provide a legal update on issues facing church retirement plans. In addition to any late breaking issues, topics that will be covered include the church plan definition and recent court rulings, and any recent action on church plan legislation. This session will also touch on fiduciary issues, such as review of fee structure and service providers. Come with your questions.

Moderator: Jim Ceplecha, Managing Director of the Retirement Services Division, Christian Brothers Retirement Planning Services

Speaker: G. Daniel Miller, Partner, Conner & Winters, LLP

Biography: Jim Ceplecha is the managing director of Christian Brothers Retirement Planning Services. He has 33 years of experience working with Catholic organizations, with the last 25 of those years overseeing the defined benefit and defined contribution plans for Christian Brothers Services. He began his career at Christian Brothers Services in 1982 and was named managing director of Retirement Planning Services in 1990.

Mr. Ceplecha holds a bachelor's degree from DePaul University. He is a Fellow in the International Society of Certified Employee Benefit Specialists, a board member for the Diocese of Joliet Priests Retirement Plan and the chair of the Church Benefit Association's Retirement Planning Group.

Jim is married to Sue and they have two children.

Biography: G. Daniel (Danny) Miller is a partner in the Washington, D.C. office of Conner & Winters, LLP, a Tulsa, Oklahoma-based law firm, and is a member of that firm's Employee Benefits Practice Group. Mr. Miller graduated from Vanderbilt University in 1971 and received his law degree from the Vanderbilt University School of Law in 1974. Mr. Miller has been practicing in the employee benefits area since graduating from law school.

In addition to serving the employee benefits needs of both large and small for-profit employers, the Employee Benefits Practice Group at Conner & Winters has a national practice serving the deferred compensation planning needs of a variety of non-profit employers. Mr. Miller serves as counsel to around twenty church denominational employee benefit plans and programs and para-church ministries, as well as to other types of non-profit organizations.

In the past, Mr. Miller served as Adjunct Professor at Southern Methodist University School of Law where for three years he taught a course on Taxation of Deferred Compensation. Mr. Miller is a member of the Employee Benefits Committee of the Tax Section of the American Bar Association and serves on the following subcommittees of that committee:

(1) The Subcommittee on Section 403(b), 457 and Exempt Organization Issues (Mr. Miller served as chair of this subcommittee from the Spring of 1989 until August, 1992);

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(2) The Subcommittee on State Insurance Regulation of Welfare Plans; and

(3) The Subcommittee on Cafeteria Plans and Flexible Compensation.

Mr. Miller is a Fellow of the American College of Employee Benefit Counsel and is a member of the Advisory Committee to the Commissioner of the Tax-Exempt and Government Employers Division of the Internal Revenue Service. Mr. Miller also serves on the IRS Mid-Atlantic Pension Liaison Group. Mr. Miller is a member and past director of the SouthWest Benefits Association.

12:15 - 1:30 pm	**Lunch & Sponsor Networking**
1:30 - 2:30 pm	**Topical Interest Breakout Session #2**

Church/Synagogue Relations Committee: Best Practices in Dealing with Low Retirement Amounts

Session Description: A "best practices" panel featuring representatives from the CBA who have funds specifically intended for members dealing with low retirement amounts.

Moderator: Rev. Dr. John G. McFayden, Vice President, Church Relations, The Board of Pensions of the Presbyterian Church (U.S.A.)

Biography: The Rev. Dr. John McFayden serves as vice president of Church Relations for the Board of Pensions of the Presbyterian Church (U.S.A.). The Church Relations office includes eight Regional Representatives who cultivate and sustain relationships with congregations and employers, ecclesiastical mid councils, and denominational organizations.

Before joining the Board in 2010, John was senior pastor of the First Presbyterian Church of Arlington Heights, Illinois. In more than 30 years of service as a Presbyterian minister, he has has served congregations ranging from 50 to more than 2,000 members in Virginia, Maryland, and Illinois.

John has served in leadership positions at every level of the Presbyterian Church including: moderator of the Presbytery of Chicago; member of the General Assembly Council, chairing its Congregational Ministries Division and its Stewardship Committee; chairperson of the of the General Assembly's Special Offerings Task Force; member of the Review Committee of the Office of General Assembly; and, most recently, chairperson of the Review Committee for the Church as a Whole and its six corporate agencies.

Communications, Marketing & Education Committee: Back to School – Creating Online Learning Opportunities to Improve Financial Literacy

Session Description: Our organizations increasingly see financial literacy as a way to engage with our members and to improve asset retention. Unfortunately we do not yet have a thinking cap that can impart a financial education. But we do have websites and the Internet! This workshop will explore what the leaders in the field are doing – think lynda.com, The Khan Academy, and Coursera – offer some general principles for developing online learning activities, and show how to leverage your existing resources to get started.

Moderator: Joyce Flournoy Wade, VP Marketing and Sales, Church Pension Group

Speaker: Frank DeStefano, President, Leadership Matters

Health Benefits Committee and Health & Wellness Committee: Denominational Roundtable

Session Description: This session will be an open roundtable discussion where participants can exchange information on various topics affecting health plans. Please come prepared to share how your denomination is responding to the challenges posed by the Affordable Care Act and the availability of the Marketplace, changes

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made in 2015, changes being proposed for 2016 and beyond, best practices, etc.

Moderator: Joe Ormont, Manager, Product and Vendor Service Management, GuideStone Financial Resources

Biography: Joe Ormont joined GuideStone in 2011, and is currently responsible for product and vendor service management within the health and welfare line of business. He is actively involved in leading product research and development, enhancing service delivery, and defining strategies related to health care reform within GuideStone and the Church Benefit Association (CBA). Prior to joining GuideStone, Joe worked in corporate finance at Healthways, a health and wellness company located in Nashville, Tennessee. He has a Bachelor of Business Administration from Texas A&M, and an MBA from Belmont University. Joe lives in Dallas with his wife Kathy, and sons Ethan and Leo.

Retirement Benefits Committee: Fiduciary Topics with Small Group Discussion

Session Description: We will have short presentations on the following fiduciary issues and then breakout two smaller groups to further discuss each issue:

1) Fees- What fees do we have? How are they charged? How do we determine what is reasonable? How do we communicate with participants?

2) Service Providers– How do we evaluate outside service providers? How often should we do searches on service providers? When do you make a change in providers?

There will be a discussion group for each topic. Please plan to join the group you have interest in and plan to share what your denomination is doing with that topic. We will end our meeting with sharing from each of the groups.

Moderator: Saundra Michael-Bowers, Vice President for Member Services, Pension Fund of the Christian Church

Speakers: Mark Borchert, Director, Retirement Products and Services, Concordia Plan Services, The Lutheran Church—Missouri Synod, Jim Ceplecha, Managing Director of the Retirement Planning Service Division, Christian Brothers Services, Del Johnson, Administrator, Seventh-day Adventist Church in North America and Rev. Jim M. O'Bold, Director of Financial Planning & Development, Servant Solutions

Biography: As Director, Retirement Products and Services, Mark Borchert is primarily responsible for a retirement program design that includes both a defined benefit plan and a defined contribution plan. He is also responsible for coordinating vendor relationships related to the retirement plans. In the past, Mark has held positions related to a variety of aspects of the retirement industry including actuarial, defined benefit administration, and defined benefit administration systems implementation. In addition, Mark is an ordained minister of the Lutheran Church – Missouri Synod and has served congregations in Houma, LA, and Baton Rouge, LA. He holds a bachelor's degree in actuarial science from Drake University in Des Moines, IA, and a Masters of Divinity degree from Concordia Seminary in St. Louis. Mark and his wife, Lisa, have two boys – an 8 year old and a 4 year old.

Biography: Jim Ceplecha, see page 11.

Biography: Del Johnson has worked primarily in financial management with the Seventh-day Adventist Church. For 17 years he served as a missionary in Asia in financial management and Healthcare Administration in Guam, Hong Kong, and Singapore. Upon his return to North America, he served as a conference treasurer in West Virginia and, since 1996, has worked in the Adventist Retirement Plan office. In 1999 he was appointed Administrator of the retirement plans of the NAD. At the end of 2015 he will have served forty years. He is an ordained minister.

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Johnson graduated from Southern Missionary College with degrees in Business Administration and Theology in 1976. He obtained an MHA from Loma Linda University in 1987.

Johnson is married to Andrea Johnson who is a registered nurse. They have two sons.

Biography: Saundra Michael-Bowers has been employed with Pension Fund of the Christian Church (Disciples of Christ) for 23 years and is Vice President for Member Services. She received her M.Div. degree from Phillips Theological Seminary, Enid Oklahoma and MBA from Butler University, Indianapolis IN. She and her minister/attorney husband are owned by a curious, stubborn cat.

Biography: Jim O'Bold oversees participant/member outreach and new project initiatives as the Director of Financial Planning and Development for Servant Solutions, the retirement plan for the Church of God.

Jim joined Servant Solutions in April 2011, after serving five years as a member of their Board of Trustees. Previously, Jim spent 24 years in the banking field, where he spent time managing multiple branches, lending to the small business market, and managing community bank initiatives.

Jim received a bachelor's degree in management from Anderson University in Anderson, Indiana, and an MBA from the University of Indianapolis. He is a Certified Financial Planner, a Certified Retirement Planning Consultant (CRPC), an Executive Pastor at Westlake Church of God in Indianapolis, and was ordained in 2012. His pastoral role allows him to serve on several teams with Indiana Ministries (Church Health and Consultation, Advisory Board Member, etc.). He loves serving the church in these multiple capacities, which he feels brings unique perspective in his ability to serve.

Jim has been married to his beautiful bride, Felisia, for 27 years and has three sons, two daughters-in-law, and two granddaughters. He enjoys his family most of all, then golf, basketball, knock-down drag-out ping-pong matches with his sons, and frequent motorcycle trips with Felisia.

2:30 pm–3:00 pm — Networking Break

3:00 pm–4:00 pm — Topical Interest Breakout Session #3

Communications, Marketing & Education Committee: Marketing Yourself: What is Your Brand!?

Session Description: We are all "brands." Your personal brand is how you market yourself and your career… and how that messaging is perceived. Your personal brand is your key differentiator from everyone else. For many, personal branding is an afterthought. Yet personal branding can make or break your job, connections, industry recognition, and more. In this session you'll learn:

- What is personal branding and why it matters
- How your personal brand is shaped
- Examples of leaders with effective personal brands
- How to assess and take control of your personal brand
- How to monitor and maintain your personal brand
- The importance of being authentically YOU!

Moderator: Kristin J. Steffen, Vice President, Marketing Strategy and Member Engagement, Portico Benefit Services

Speakers: Terry Arya, Chief Marketing Officer, Christian Brothers Services and Roy Hayhurst, Department Head, Denominational & Public Relations Services, GuideStone Financial Resources of the Southern Baptist Convention

Biography: Terry Aryahas been leading the marketing and business development efforts at Christian Brothers Services since 2011. Prior to joining CBS, Terry was the Vice President of Marketing, Communications and Development for Marklund, a not-for-profit organization serving infants, children, and adults with severe

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developmental disabilities. Her career also included national public relations and marketing leadership for an association of healthcare financial management executives. She has also worked in the tourism industry, where she traveled internationally to attract events to help boost the Illinois economy. Terry has consulted for numerous business, municipalities and franchise owners in areas including marketing, public relations, social media, business development, and strategy.

Biography: Roy Hayhurst joined GuideStone in 2005, working in the Communications department. Since then, he has held a variety of writing, marketing, social media and public relations roles, providing strategic counsel and tactical execution of various campaigns and projects to promote the GuideStone brand among participants, prospects and the broader evangelical community and media.

Biography: Kristin Steffen joined Portico in 2014, and leads the development and management of products and services, as well as member engagement through education and communication. Kristin has over 25 years of product and marketing experience in a variety of industries including financial services, health care, and consumer packaged goods. Prior to joining Portico, Kristin was Vice President of Marketing at Ameriprise Financial for eight years, helping Americans prepare for retirement.

CFOs Committee: CFO Roundtable

Session Description: This session will be conducted as an open roundtable discussion between the CFOs.

Moderators: Duncan Draper, Treasurer/Vice President and Chief Financial Officer, Pension Fund of the Christian Church, Tim Koch, CFO, United Methodist Church and Stacy A. Kruse, Vice President, Chief Operating and Financial Officer, Portico Benefit Services

Biography: Duncan Draper Treasurer/Vice President and Chief Financial Officer, Pension Fund of the Christian Church Duncan Draper serves as the Treasurer/Vice President and Chief Financial Officer of the Pension Fund of the Christian Church. Mr. Draper's responsibilities include financial planning and analysis, enterprise risk management, compliance, treasury services, accounting, technology services, operations, and the call center. Mr. Draper previously served as Treasurer of the Ohio Region of the Christian Church. Most of his career was in banking serving in a variety of roles, most recently as Senior Vice President of Treasury Operations for a large national bank. He earned a MBA from Baldwin Wallace College and undergraduate degrees from Thomas More College. He currently serves on the Board of Directors of the Insurance Board, Cleveland, Ohio.

Biography: Tim Koch CFO, United Methodist Church Tim joined the General Board of Pension and Health Benefits of the United Methodist Church in 2008. As its Chief Financial Officer he has responsibilities for Treasury, Actuarial Services, Central Conference Pension Initiative (establishing and maintaining pensions outside the United States) and Investments. Tim earned a MBA, CPA and serves on the Board of Directors of Community Alternatives Unlimited (serving the developmentally disabled), and volunteers for Ladder Up (providing financial literacy, tax return and FAFSA preparation services to individuals and families with low incomes).

Biography: Stacy Kruse is Vice President and Chief Operating and Financial Officer for Portico Benefit Services. Stacy leads all aspects of Operations and Finance and Administration, including financial planning and analysis, enterprise governance, risk management and compliance, treasury, controller and accounting. Prior to joining the Portico in September 2008, Stacy served as Chief Financial Officer and Treasurer and previous to that as Vice President of Finance for PreVu, Incorporated (formerly Wilsons The Leather Experts Inc.). Her career experience also includes financial and accounting positions at U.S. Bancorp, Carlson Marketing Group and Ellerbe Becket. Stacy is a Certified Public Accountant (inactive) and a member of the Minnesota Society of Certified Public Accountants. She received her bachelor's degree from Winona State University in Winona, Minn.

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Customer Service Committee: Should we offer Financial Planning Services?

Session Description: This Committee will explore the advantages and possible disadvantages of offering financial planning services and look at whether these services should be offered internally or via external channels. What is the impact on Client satisfaction, loyalty and client/asset retention? How does this help the company from a competitive standpoint?

Moderator: Matthew Hoffman, Director of Service, MMBB Financial Services

Speakers: Kathie Floyd, Senior Vice President, Education and Wellness, Church Pension Group, Dale Jones, Managing Director, Education and Plan Sponsor Relations, General Board of Pension and Health Benefits and Todd Muchnicki, Chief Operating Officer, The Pension Boards – United Church of Christ

Biography: Kathy Floyd joined CPG as Senior Vice President; Education and Wellness. She is an education professional with over 25 years of experience in the development and implementation of financial education programs and curriculum. Prior to joining CPG, Kathy served five years in Washington, D.C. as Senior Advisor in the Office of Financial Education at Consumer Financial Protection Bureau (CFPB) and Deputy Director for Investor Education for the U.S. Securities and Exchange Commission. In a previous position she was the Executive Director of Stock Market Game for the Securities Industry and Financial Markets Association (SIFMA), and Director, Baltimore Academics, for the Baltimore City Public School System. She has two children and lives in New Jersey.

Biography: Matthew Hoffman has been with MMBB Financial Services for 13 years. He is currently the Director of Service and Corporate Secretary for the organization. Prior to joining MMBB, he was a vice president at JPMorgan Chase and also worked in the private client group at Merrill Lynch. He holds a Masters of Science in finance from Boston University and also is a graduate of the Harvard Business School. He holds the CFP® and ChFC® designations.

Biography: Dale Jones has been with the General Board of Pension and Health Benefits since 1999, where he leads the agency's relationship management and benefits education functions. Prior to joining the General Board, he served as the administrative, financial, and benefits officer for a United Methodist judicatory in Kentucky. He holds an MBA from Xavier University, a degree in engineering from Tennessee Tech University. He has the Retirement Plans Associate designation from the International Foundation of Employee Benefits Plans.

Biography: Todd Muchnicki joined the staff of PBUCC in 2011 as Chief Operating Officer. In addition to responsibility for day-to-day operations, Todd oversees PBUCC's Member Services and Information Technology departments. Todd serves on the Executive Management Team and acts as key staff to the Benefits Committee of the Board of Trustees, which is charged with the governance of all benefit programs and products offered to members.

Prior to joining PBUCC, Todd was a Principal & Consulting Actuary at Buck Consultants in their New York, NY office. In his 20 years at Buck, his clients included church plans, not-for profit organizations, private and public companies, law firms and other partnerships, multi-employer plans, and unions.

Todd is an Enrolled Actuary, a Member of the American Academy of Actuaries, and a Fellow of the Conference of Consulting Actuaries.

Legal Committee: Current Legal Trends for Church Plans

Session Description: Panel discussion and Q&A regarding current legal issues and trends of interest to church plans.

Moderator: Andrew Hendren, General Counsel, General

Wednesday, December 2, 2015

Board of Pension & Health Benefits of The United Methodist Church

Speakers: A panel of lawyers from the Core Lawyer Working Group of the Church Alliance

Biography: See page 5.

4:00 pm–5:00 pm	**Sponsor Networking**

5:00 pm	**Dinner on Own**

Thursday, December 3, 2015

7:00 am–8:00am	**Continental Breakfast**

8:00 am–8:45 am	**Opening Devotional**

Choir: Calvert Hall College High School

Biography: Calvert Hall College High School is a private, Catholic college preparatory high school in the tradition of the De La Salle Christian Brothers. Founded in 1845, it is the oldest Lasallian School in the United States.

8:45 am–9:00 am	**Welcome**

Speaker: Barbara A. Boigegrain, Church Alliance Chair, General Secretary and CEO, General Board of Pension and Health Benefits of The United Methodist Church

Biography: See page 6.

9:00 am–10:00 am	**Church Alliance Plenary**

Speaker: Paul Begala, Commentator, CNN

Biography: Paul Begala is a commentator for CNN, where he is part of the political team that has won both an "Emmy" and a "Peabody Award." In the 2012 campaign he was a senior adviser for the pro-Obama Super PAC, making Begala one of the few people to play a critical role in electing two different presidents.

After helping engineer Bill Clinton's presidential campaign with his partner, James Carville, Begala served as counselor to the President, one of Clinton's closest aides. He has consulted for political campaigns across the country and around the world, including advising politicians in Europe, Latin America, the Caribbean and Africa.

Former President Bill Clinton described his longtime friend and former aide as, "a witty dynamo from Sugar Land, Texas...who brought energy, focus and credibility to our efforts." Secretary of State Hillary Clinton says Begala, "embodies a passion for populism with a commitment to civility, no easy feat."

And radio talk show host Rush Limbaugh has said of Begala, "If you don't know who The Forehead is, Paul Begala, he's the guy, the kid that played the banjo on the bridge in the movie Deliverance."

He helped his friend John F. Kennedy, Jr. launch the political magazine *George* and wrote the "Capitol Hillbilly" column, and is the author of several *New York Times* best-selling political books.

Begala is an affiliated professor of Public Policy at Georgetown University. He has also taught at the University of Texas and the University of Georgia. Along with James Carville and GOP strategist Karl Rove, he was a recently inducted into the American Association of Political Consultants' Hall of Fame.

Begala received his bachelor's degree in Government and his law degree from the University of Texas at Austin, where he was the student body president.

10:10 am–10:15 am	**Closing Remarks**

Speaker: Arthur D. Rhodes, CBA Planning Committee Chair, President & CEO, Church of God

Biography: See page 4.

Sponsor Table Tops

Hours:

Tuesday, December 1, 2015	9:00 AM – 6:00 PM
Wednesday, December 2, 2015	9:00 AM – 5:00 PM

Sponsors:

ACSIA Partners	Capstone Financial
Express Scripts	Fidelity Investments
Geo Blue	Give Central
Liberty Mutual Group Benefits	Morneau Shepell
Mutual of America	Northern Trust
ProManage, LLC	United Concordia
Who's Where	

Hotel Accommodations

The 2015 CBA Annual Meeting will take place at:

Hyatt Regency Baltimore
300 Light St
Baltimore, MD 21202
(317) 860-5800

Housing Deadline Friday, November 6, 2015

Rate: Hotel rooms are being held for the 2015 CBA Annual Meeting at a special rate of **$149** for single or double rooms, excluding applicable state and local taxes.

Reserve: Hyatt Regency Baltimore Direct Reservations: Call 410-528-1234 and reference the 2015 Church Benefits Association meeting or **click here** to reserve online.

This discounted rate is only available when you make reservations directly through the Hyatt. There are a limited number of rooms guaranteed at this rate, so make your reservations as soon as possible.

After **Friday, November 6, 2015,** hotel reservations will be taken on a room and rate availability basis.

All reservations must be accompanied by a major credit card to guarantee the room reservation. Reservations must be cancelled at least 24 hours prior to arrival in order to avoid a one night's room and tax charge.

Cancellations must be made directly with the Hyatt.

Check-in time is 4:00 pm

Check-out time is 11:00 pm

Offsite Dinner

Join your fellow CBA meeting attendees at the **American Visionary Art Museum, Jim Rouse Visionary Center (JRVC).** The American Visionary Art Museum (AVAM) is America's official national museum and education center for intuitive, self-taught artistry. Featuring many pieces of eccentric artwork, the museum is a popular destination for area visitors. The AVAM devotes its space to original work by self-taught artists who honed their craft—often unintentionally.

TRAVEL INFORMATION

Hotel & Transportation Information

Airport:

Baltimore Washington International Airport

Drive time to Hyatt Regency Baltimore: 15 minutes (10 miles)

Hotel Parking:

Self-parking for overnight guests is $28 per day and valet parking is $40 per day. Rates include in/out privileges.

Taxi:

Approximate cost from Baltimore-Washington International Airport to Hyatt Regency Baltimore is $35.

Taxi from Washington National – approximately $115

Taxi from Dulles Airport – approximately $160

Taxi from Amtrak Penn Station – approximately $5

Shuttle:

Super Shuttle – Make reservations in advance at **www.supershuttle.com.**

Approximately $15 each way.

Light Rail:

Maryland Transit Administration

Transit Information Contact Center: (410) 539-5000

Toll Free: 1-866-743-3682 or TTY (410) 539-3497

Fares:

One-Way $1.70 • Day Pass: $4

Rail:

Amtrak

Baltimore Station: Penn Station Baltimore

Reservations & Customer Service:
1-800-872-7245 or TDD/TTY 1-800-523-6590

CBA Headquarters and Staff

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CBA Church Benefits Association

2015 ANNUAL MEETING

December 1–3, 2015 • Hyatt Regency Baltimore

BALTIMORE, MD

REGISTRATION FORM

Pre-Registration Deadline: Friday, Nov. 6, 2015

A registration form (pages 1-2) must be completed for each attendee.
Please print clearly as this information will be used for your meeting name badge.

Contact Information

First Name ____________ Last Name ____________

Title ____________ Denomination/Organization ____________

Address ____________

City ____________ State ____________ Zip ____________

Phone ____________ Fax ____________

Email ____________

Dietary needs, if applicable

❑ Kosher

❑ Vegetarian

❑ Other

Registration type

❑ CBA Member Denomination

❑ Prospective Member

(Sponsoring CBA Member and Denomination)

____

❑ Vendor

(Sponsoring CBA Member and Denomination)

____

❑ Sponsor Table Top

Are you a New Member or First Time Attendee to the CBA Annual Meeting?

❑ Yes ❑ No

Are you a Retiring Member of CBA?

❑ Yes ❑ No

Demographics

❑ Administration

❑ Chief Administrative Officer/ CEO

❑ Chief Financial Officer/ Controller

❑ Chief Information Officer

❑ Chief Investment Officer

❑ Chief Operations Officer

❑ Communication/Education/ Publication

❑ Health/Welfare Benefits

❑ Human Resources

❑ Information Technology

❑ Investments

❑ Legal Counsel/Compliance

❑ Marketing

❑ Retirement Benefits

❑ Trustee

❑ Other

____

Registration Fees

Please check off which apply:

Registration Fees, please check off which apply	Prior to Nov. 6, 2014*	After Nov. 6, 2014
❑ Attendee *(Fee includes all meetings, dinner Tuesday and lunch Wednesday)*	$300 per person	$325 per person
❑ Spouse/Guest *(Fee includes dinner Tuesday and lunch Wednesday)*	$75 per person	$75 per person

**Registration Form must be postmarked before Friday, Nov. 6, 2015*

____

Spouse/Guest name

$____________ Total Registration Fee Enclosed

Refund Policy

Requests for refunds must be received in writing by the CBA office by **Friday, Nov. 6, 2015.** Refunds will not be processed until after the Annual Meeting concludes.

Questions

Contact: Caroline Olson • Phone: (856) 439-0500
Email: **colson@churchbenefitsassociation.org**

Make checks payable to CBA (U.S. funds drawn on U.S. banks only)

Mail checks to:

Caroline Olson • Church Benefits Association
1120 Route 73, Suite 200 • Mt. Laurel, NJ 08054

CBA Church Benefits Association

2015 ANNUAL MEETING

December 1–3, 2015 • Hyatt Regency Baltimore

BALTIMORE, MD

REGISTRATION FORM

Pre-Registration Deadline: Friday, Nov. 6, 2015

Indicate which sessions you plan to attend

Tuesday, December 1, 2015

- ❑ **9:00 am–11:00 pm**
  Church Alliance Steering Committee Meeting
- ❑ **9:00 am–6:00 pm**
  Sponsor Table Tops

9:15 am–1:45 pm
Pre-Meeting Vendor Meetings

- ❑ **9:15 am–10:15 am**
  Highmark
- ❑ **10:30 am–1:45 pm**
  Express Scripts Inc.
- ❑ **10:30 am–1:45 pm**
  Catamaran

- ❑ **11:30 am–1:00 pm**
  (CFOs/CIOs only)
- ❑ **11:30 am–2:30 pm**
  CEO Breakout Session and CBA/Church Alliance Business Meetings
  (Open to CEOs Only)
- ❑ **1:00 am–2:30 pm**
  Information Technology
  Pre-Meeting Session
- ❑ **1:30 am–2:30 pm**
  Trustee Session
- ❑ **3:00 pm–3:15 pm**
  Welcome
  Opening Devotional
- ❑ **3:15 pm–3:45 pm**
  Washington Update
- ❑ **3:45 pm–4:45 pm**
  CBA Report of Significant Developments
- ❑ **4:45 pm–5:30 pm**
  New Member and First Time Attendee Orientation
- ❑ **4:45 pm–6:00 pm**
  Sponsor Networking
- ❑ **6:15 pm–9:30 pm**
  Networking Dinner at the American Visionary Art Museum, Jim Rouse Visonary Center (JRVC)
  Offsite

Wednesday, December 2, 2015

- ❑ **8:00 am–8:35 am**
  Opening Devotional
- ❑ **8:35 am–9:40 am**
  Investment Plenary
- ❑ **9:40 am–10:00 am**
  Networking Break
- ❑ **10:00 am–11:05 am**
  Health Care Plenary

11:15 am–12:15 pm
Topical Interest Breakout Session #1

- ❑ Church/Synagogue Relations Committee and Health & Wellness Committee: Regarding Low Retirement Amounts
- ❑ Health Benefits Committee: Legislative and Regulatory Update
- ❑ Investments Committee: Investments
- ❑ Retirement Benefits Committee: Legal Update on Issues Affecting Retirement Plans

- ❑ 12:15 pm–1:30 pm
  Lunch & Sponsor Networking

1:30 pm–2:30 pm
Topical Interest Breakout Session #2

- ❑ Church/Synagogue Relations Committee: Best Practices in Dealing with Low Retirement Amounts
- ❑ Communications, Marketing & Education Committee: Back to School – Creating Online Learning Opportunities to Improve Financial Literacy
- ❑ Health Benefits Committee and Health & Wellness Committee: Denominational Roundtable
- ❑ Retirement Benefits Committee: Fiduciary Topics with Small Group Discussion

- ❑ **2:30 pm–3:00 pm**
  Networking Break

3:00 pm–4:00 pm
Topical Interest Breakout Session #3

- ❑ Communications, Marketing & Education Committee: Marketing Yourself: What is Your Brand!?
- ❑ CFOs #1: CFO Roundtable
- ❑ Customer Service Committee: Should we offer Financial Planning Services?
- ❑ Legal Committee: Current Legal Trends for Church Plans

- ❑ **4:00 pm–5:00 pm**
  Sponsor Networking

Thursday, December 3, 2015 • Church Alliance Annual Meeting

- ❑ **7:00 am–8:00 am**
  Continental Breakfast
- ❑ **8:00 am–8:45 am**
  Opening Devotional
- ❑ **8:45 am–9:00 am**
  Welcome
- ❑ **9:00 am–10:00 am**
  Church Alliance Plenary Speaker
- ❑ **10:00 am–10:15 am**
  Closing Remarks