



P.O. Box 307
Grand Central Station
New York, NY 10017

The New York Metro Area Chapter invites you to attend...

2008 Form 5500 Presentation

Plan Administrators of employee benefit plans are required to file an annual report with the Employee Benefit Security Administration (EBSA) that includes Form 5500, related schedules, and other attachments. The information presented will include the recent guidance provided from the regulators at the 2009 AICPA conference. The presenter will discuss all of the materials required to be filed, the uses of the information by the regulatory agencies, responding to EBSA and IRS Notices, amended filings, and other related filing matters. If you need a review of these annual reporting requirements, or want to find what's new (and what's not), this session is for you. A brief overview of the 2009 EFAST2 filing process will be provided.

Speaker

**Louis F. LiBrandi, Fellow - ISCEBS, ChFC, QPA & Enrolled Agent
Director
Compensation & Benefits Advisory Practice
McDermott Will & Emery LLP**

Louis F. LiBrandi is a Director in McDermott's Advisory Practice serving clients in all aspects of employee benefits plans with a specific focus on tax and compliance matters. He is responsible for coordinating and preparing the employee benefit plan filings of large clients with the EBSA and the IRS. He also prepares Voluntary Compliance Program applications, and performs compliance reviews for all types of employee benefit plans and related processes (i.e., payroll, and tax reporting). His other areas of expertise include obtaining IRS determination letters, the preparation and review of plan documents and summary plan descriptions for cafeteria and 'wrapped plans', as well as plan terminations of all types.

Louis received an accounting degree from Long Island University and has subsequently earned various designations. After serving as an IRS agent in the Employee Plans Division, he has practiced for over 13 years - initially as a Senior Manager for KPMG's Compensation & Benefits Practice and currently as a Director at McDermott Will and Emery LLP.

Louis is President and a member of the Board of Directors of the New York Metropolitan Chapter of the International Society of Certified Employee Benefits Specialists (ISCEBS), and is a member of the American Institute of Certified Public Accountants (AICPA) Tax Task Force as a reviewer of the Form 5500. He has previously instructed CEBS classes at The College of Insurance and Hofstra University. He has recently co-authored articles with McDermott Employee Benefit Partners about responding to IRS and DOL Notices (including the IRS's initiative of contacting plan administrator's for non-filed Form 5500s) and the new regulations and related reporting requirements applicable to IRC Section 403(b) plans.

Date: June 4, 2009

Time: Registration check-in begins at 8:15 AM

Refreshments will be provided

Presentation / Q & A from 8:35 AM – 10:05 AM

Meeting Location and Directions:

McDermott Will & Emery LLP

340 Madison Avenue (1 block west of Grand Central Station at 43rd Street)

2nd Floor Rooms Astor & Broadway

New York, NY 10173

PHOTO ID and pre-registration is required to enter the building!



Registration Form
2008 Form 5500 Presentation

Please Print

Name _____

Company _____

Address _____

City/State/Zip _____

Telephone (____) _____

Fax (____) _____

E-Mail _____

NY Metro Area Chapter: Member – Free Non-Member \$35 Fee

Please update my information listed above Please send me membership information

Please R.S.V.P. by Friday, May 29, 2009 (5pm)

Tax ID #: 13-3293220

Registration by Telephone/Fax/E-Mail:

Telephone/Fax: (973) 448-0022

E-Mail: Silent@worldnet.att.net

Registration/Payment (Check) by Mail:

New York Metro Area Chapter – ISCEBS

c/o Silent Secretary

P.O. Box 381

Stanhope, NJ 07874

Payment via Pay Pal:

Payment can be made via Pay Pal or credit card by visiting www.iscebs.org/nymetro. Please note that if paying by Pay Pal or credit card, you still need to submit this registration form via email or fax as noted above.

Confirmations will be emailed (or faxed if an email address is not provided or on file) approximately one week before the meeting.

For questions please contact:

Louis F. LiBrandi, Fellow - ISCEBS

McDermott Will & Emery

212-547-5755

Sponsored by the New York Metropolitan Area Chapter of the International Society of Certified Employee Benefit Specialists (ISCEBS), a nonprofit organization that serves as an educational resource for certified employee benefit specialists and others in the employee benefits community.