



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

Forms 5500 & 8955-SSA: A review of the filing & audit requirements for the 2014 plan year for Employee Benefit Plans

Please join us as our speakers, Louis LiBrandi and Matthew Corona of O'Connor Davies, LLP, discuss the Forms and related schedules required to be filed annually with the DOL and IRS, including what's new and other updates for the 2014 plan year. The presentation will also cover audit requirements for large employee benefit plans.

**Louis F. LiBrandi, CEBS, ChFC, QPA
O'Connor Davies, LLP**

Louis F. LiBrandi is a Principal at O'Connor Davies serving clients in all aspects of employee benefits plans with a specific focus on tax and compliance matters. His other areas of expertise include consulting on non-qualified deferred compensation plans, obtaining IRS determination letters, the preparation and review of plan documents and summary plan descriptions for cafeteria and 'wrap plans', as well as plan terminations.

Louis is former President and is a current member of the Board of Directors of the New York Metropolitan Chapter of the ISCEBS. He is also 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 co-authored articles with attorneys about responding to IRS and DOL Notices. He has presented on numerous compliance topics, IRS/DOL voluntary programs, and the reporting requirements applicable to welfare, retirement and IRC Section 403(b) plans.

**Matthew Corona, CPA
O'Connor Davies, LLP**

Matt is a Senior Audit Manager with O'Connor Davies. His many years of service in public accounting include extensive experience with employee benefit plans. Matt is a graduate of Pace University with a Bachelor of Business Administration degree in accounting. He is affiliated with the American Institute of Certified Public Accountants and the New York State Society of Certified Public Accountants.

Date: Tuesday, June 9, 2015
Time: Registration check-in begins at 8:30 AM
Presentation / Q & A from 9:00 AM – 10:00 AM

Meeting Location and Directions:

Penguin Random House, 1745 Broadway, 14th Floor, Dr. Seuss Room (b/t 55th & 56th St)

Directions

Take the 1, A, or C to Columbus Circle, the N, Q, or R to 57th St / 7th Ave, the B, D, or E to 53rd St / 7th Ave, or take the F to 55th St / 6th Ave

NOTE: Photo ID and pre-registration are required to enter the building!



Online Registration Form

Forms 5500 & 8955-SSA: A review of the filing & audit requirements for the 2014 plan year for Employee Benefit Plans

[REGISTER HERE](#)

To attend you must register by **Friday, June 5, 2015 (5 PM)**

Attendees of this event will receive 1.0 hour CEBS CPE credit.

NEW: This event will also be eligible for 1.0 hour of HRCI credit, pending approval by the HCRI, and 1.0 hour of SHRM PDC credit, pending approval by SHRM.

If you will not be able to attend, please notify us no later than 5:00 PM on Friday, June 5, 2015. Non-members not able to attend must notify us by this date to receive a refund.

NY Metro Area Chapter Meeting Costs:

Member – Free

Non-Member – \$30 Fee*

** Any non-member that attends and pays for two meetings in 2015 will automatically become a member of the Chapter for the remainder of the year (if eligible).*

Payment for non-members of the NY Metro Chapter:*

- Via PayPal, you will be taken to the payment page once you [register](#) for the event on our [website](#).

*Please note that the NY Metro Chapter will no longer accept payment by check during registration on the day of the event. **All non-members must pay through PayPal.**

Tax ID #: 13-3293220

The NY Metro Chapter of ISCEBS is now accepting online [registrations](#). Please contact Sue Andres if you have any questions or feedback regarding the new registration process:

E-Mail: support@cebsnyc.org

Telephone: (718) 705-4263

For questions about the program, please contact Megan Schmidt:

E-Mail: education@cebsnyc.org

Telephone: (917) 628-4080



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.