

GETTING IT RIGHT

Know Your Fiduciary Responsibilities



A RETIREMENT PLAN COMPLIANCE ASSISTANCE SEMINAR FOR SMALL BUSINESS

PORTLAND, OR – APRIL 10, 2019

Strong fiduciary oversight and protecting workers' benefits is one of the highest priorities of the U.S. Department of Labor. The best way to protect workers' benefits is by preventing problems before they start. Our compliance assistance program – Getting It Right – Know Your Fiduciary Responsibilities – will increase awareness and understanding about basic fiduciary responsibilities when operating a retirement plan.

Getting it right, however, can be challenging. This is especially true for small and medium sized employers who have limited time, resources, and access to professional help with benefit programs.

Specifically, getting it right means:

- Understanding your plan and your responsibilities;
- Carefully selecting and monitoring service providers;
- Making contributions on time;
- Avoiding prohibited transactions; and
- Making appropriate disclosures to plan participants and filing annual reports to the government on time.

Our program combines free seminars around the country, educational materials, and a dedicated webpage on EBSA's Web site. With the valuable participation of our partners, Getting It Right will offer a helping hand to those who want to do the right thing.

We hope you will join us at this upcoming seminar. Helping fiduciaries to get it right benefits us all.

AGENDA

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| ▪ Registration & Sign in | 8:30 – 9:00 a.m. |
| ▪ Welcome - U.S. Department of Labor & Partners | 9:00 – 9:30 a.m. |
| ▪ Fiduciary Responsibility - Speaker: U.S. Department of Labor | 9:30 – 10:30 a.m. |
| ▪ BREAK | 10:30 – 10:45 a.m. |
| ▪ Fiduciary Responsibility (cont.) - Speaker: U.S. Department of Labor | 10:45 a.m. – 12:30 p.m. |
| ▪ LUNCH (on your own) | 12:30 – 1:30 p.m. |
| ▪ Fiduciary Responsibility Questions and Answers | 1:30 – 2:00 p.m. |
| ▪ Reporting and Disclosure - Speaker: U.S. Department of Labor | 2:00 – 3:00 p.m. |
| ▪ BREAK | 3:00 – 3:15 p.m. |
| ▪ Common Mistakes & IRS Correction Programs –Speaker:
Internal Revenue Service | 3:15 – 4:15 p.m. |
| ▪ DOL Voluntary Correction Program - Speaker: U.S. Department of Labor | 4:15 – 4:30 p.m. |
| ▪ Questions and Answers | 4:30 – 5:00 p.m. |

SEMINAR LOCATION

UNIVERSITY PLACE HOTEL & CONFERENCE CENTER
COLUMBIA BALLROOM
310 SW LINCOLN STREET
PORTLAND, OR 97201
(503) 221-0140

<https://www.uplacehotel.com/>

SEMINAR PARTNERS

- Society for Human Resource Management
- National Federation of Independent Business
- U.S. Small Business Administration
- American Institute of Certified Public Accountants

Cooperation does not constitute or imply an endorsement by the government of any product or service of the private sector partners.

This seminar is FREE. Registration will be on a first come first served basis, so please register as soon as possible and ***NO LATER THAN April 5, 2019.***

For more information please contact:

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