

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Albany 04/02/19	Webcast: Building Resilience: Practical Tools to Help our Workplace Thrive	8	Dr. Joel Bennett, President, Organizational Wellness and Learning Systems (OWLS)	1.5
Alberta 01/31/19	The End of the Road: Why First-Generation Drug Plan Management Strategies are Obsolete		Mike Sullivan, CEO, Cubic Health	1
Alberta 10/2/19	Canadian Legal and Legislative Update (Edmonton)		Kristin Smith, B.A., LL.B., Principal, Mercer	1
Alberta 10/3/19	Canadian Legal and Legislative Update (Calgary)		Kristin Smith, B.A., LL.B., Principal, Mercer	1
Alberta 11/13/19	The Future of Work and Economics of Community (Edmonton)	11	Todd Hirsch, VP, Chief Economist, ATB Financial	1
Alberta 11/19/19	The Future of Work and Economics of Community (Calgary)	10	Todd Hirsch, VP, Chief Economist, ATB Financial	1
Atlantic Canada 04/02/19	Webcasts (three locations): Small Tweaks Big Impact and Legislative Trends in Benefits	33	Steve Vernon, Pres, Stanford Ctr of Longevity Murray Gold, Partner, Koskie Minsky Kathryn Bush, JP, Partner, Blake Cassels	1
Atlantic Canada 04/24/19	Spring Education Session Medicalization of Unhappiness Total Rewards, Benefits, and Diversity HR Trends and their Impact on DC Plans	40	Peter Gove, Innovation Leader, Green Shield Jeremy Woo, Associate, Mercer (Canada) Mard de Rome, Consultant Morneau Shepell Michelle Loder, VP DC Consult, Morneau Shepell	3.5
Baltimore 02/21/19	Arriving Now – Rare Disease Therapies \$500,000 and Higher: Plan Sponsors Take Warning!	Cancel	Ryan Siemers, CEBS, Principal, Aegis Risk	2
Baltimore 03/21/19	J-Codes: Your Healthcare Plan's Biggest Enemy	Cancel	Scott Mayer, Dir Data Analytics, AssuredPartners Benefit Advisors	2
Baltimore 04/18/19	Arriving Now – Rare Disease Therapies \$500,000 and Higher: Plan Sponsors Take Warning!	Cancel	Ryan Siemers, CEBS, Principal, Aegis Risk	2
Baltimore 10/17/19	Recent Developments Affecting Employee Benefit Plans	24	Adam Meehan, Partner, Smith & Downey	2
Baltimore 02/20/20	Best Practices in Plan Design and Fiduciary Oversight		Jamie Bruton, Partner, Bruton Chisnell Advisors Michael Chisnell, Partner, Bruton Chisnell Advrs	2
Birmingham 03/20/19	Market Update - Volatility	22	Fred Lanier, VP, Client Advisor, JP Morgan Asset Management	1
Birmingham 08/20/19	EEO-1's New Pay Data Reporting Due September 30	39	Matt Stiles, Shareholder, Emp Bnfts & Exec Comp, Maynard Cooper & Gale	1
Birmingham 10/18/19	New FLSA Regulations for the Overtime Exemption	18	Scott Williams, Partner, Burr Forman	1
British Columbia 02/28/19	Disability Strategies to Eliminate Under-Insurance, An Employer's Key Concern	16	Jamie Laprise, Associate Advisor, Montridge Advisory Group	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
British Columbia 03/05/19	Fundamentals of Group Benefits and Pension Plans <ul style="list-style-type: none"> • Health, Dental and Disability Plans • Underwriting • Benefit Plan Administration • Government Retirement Programs • Defined Contribution Plan Basics Defined Benefit Plan Basics	22	Peter Graham, CEBS, CFP, Porchlight Financial Lauren Metcalf, GBA, Great West Life Natasha Norbjerg, GBA, TRG Group	6
British Columbia 05/14/19	The Effects of Sugar on the Brain	13	Avinash Maniram, Consultant, PBI	1
British Columbia 06/04/19	Legal Update	20	Ms. Kaneen, Partner, Lawson Lundell LLP	1
British Columbia 09/24/19	DB vs DC: Understanding the Value of Your Pension	13	Stephen Cheng, Sr Consulting Actuary, Westcoast Actuaries	1
British Columbia 11/21/19	Employment Law Update: New Developments & Common HR Pitfalls	29	Ryan Anderson, Partner, Mathews, Dinsdale & Clark LLP	1
British Columbia 02/13/20	The Advisor Value Proposition: How Modern Advisors Differentiate Their Advisory Services From the Policies They Sell		Matt Lister, Co-Founder, CEO, CludAdvisors	1
British Columbia 03/12/20	Fundamentals of Group Benefit & Pension Plans <ul style="list-style-type: none"> • Group Retirement (3 CEBS credits) <ul style="list-style-type: none"> ○ Government Retirement Programs ○ Defined Contribution Plan Basics ○ Defined Benefit Plan Basics • Group Benefits (3 CEBS credits) <ul style="list-style-type: none"> ○ Health, Dental and Disability Plans ○ Underwriting ○ Benefit Plan Administration 		Peter Graham, CEBS, Leader, Porchlight Fncl Nellie Pandey, Consultant, PBI Actuarial Preet Pakk, CEBS, Associate, Montridge Maury Lum, CEBS, Acct Exec, iA	3
British Columbia 04/17/20	Webinar: Maple Virtual Health: An Option for BC Residents		David Seagrave, Head of Sales, Maple Virtual Health	1.5
Capital 01/17/19	Legislative Update		James Klein, President, American Benefits Council	1.5
Capital 03/21/19	Leveraging Behavioral Economics in Employee Benefit Programs		David Johnson, Vice President, Segal Group	1.5
Capital 06/20/19	Gene-based Testing and Treatment: Applying Genetics and Pharmacogenomics – Is Your Plan Ready for Precision Medicine?		Joe Spinelli, CCO, Medtek21 Dave Ratcliffe, Health & Prod Leader, Buck	1.5
Capital 09/26/19	Cybersecurity and Employee Benefits: Beyond Checking the Box		Petula Workman, J.D., CEBS, Sr VP, Gallagher	1.5

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Capital 03/31/20	Webinar: Retirement Policy Legislative Update		Chantel Sheaks, Exec Dir Retirement Policy, US Chamber of Commerce	1
Carolinas 07/11/19	A Benefits Professional's Guide to South Carolina's Healthcare Provider Landscape	10	Dr. Tripp Jennings, Clinical Innovation Officer, VP, BlueCross BlueShield of SC	1
Carolinas 11/13/19	Fall Education Session <ul style="list-style-type: none"> • HSAs: The Integration of Health and Wealth for Retirement • Student Loan Assistance Programs: Bridging the Gap to Retirement Savings 	14	Scott MacDonald, CEBS, VP, HSA Bank Marvin Stokes, Wealth Practice Leader, Mercer	2
Central Indiana 04/23/19	Fiduciary Education	25	Matthew Harger, DOL	1
Central Indiana 05/21/19	Health & Welfare – Full Day Seminar <ul style="list-style-type: none"> • ACA Update and Related Topics • Defined Contribution Health Care Accounts • A COBRA Administration Refresher Course • Other Welfare Plan Developments • Health and Welfare Plan Issues Under Employment Laws • HIPPA Security 	18	Christopher Sears, Stephen Reynolds, Tara Schulstad Sciscoe, Austin Anderson, Shalina Shaefer, Metzger Ice Miller	7
Central Indiana 08/22/19	Full Day Retirement Seminar <ul style="list-style-type: none"> • Fiduciary Training • Litigation Trends • Plan Sponsor Best Practices • Plan Design and Participant Trends • Washington Updates • Panel Discussion: What to expect from a DOL/IRS/CPA Audit 		Michael Paton, Barnes & Thornburg Dave Leising, BKD Elizabeth O'Gara, Ogletree Deakins Brea Danti, Michael Paton & Doug Prince ProCourse Fiduciary Advisors	7.5
Central Indiana 12/03/19	Health Care Ate My 401(k) Contributions		Rocke Blair, CEBS, Partner, Fiduciary Analytics Peggy West, CEBS, Director, Formica Corp	1
Central Ohio 01/05/19	Health Trends in the Workplace	23	Marcus Miles, Blue Communications	1
Central Ohio 12/05/19	Health Care Ate My 401(k) Contributions	29	Rocke Blair, CEBS, Partner, Fiduciary Analytics Peggy West, CEBS, Director, Formica Corp	1
Chicago 10/17/19	2019 Employee Benefits Symposium <ul style="list-style-type: none"> • Benefits Strategy Using Benchmarking • Understanding Best Practices in Leave Management • Health Plan and Prescription Drug Contracting • Plan Sponsor Takeaways from 401(k) Lawsuits • The Impact of Long-Term Care on Employers • Retirement Plan Updates 	40	David Cooke, CEBS, USI Midwest Whitney Day, Mercer Andrew Douglass, ReedSmith John Roegner, RPA, NFP Jerry Manning, CLTC, JManning & Associates Steven Grieb, JD, CEBS, Empower Retirement	6
Cincinnati/Dayton 04/10/19	Value Based Healthcare Trends for Employers	8	Tim Cappel, Executive Director Ken Schorsch, Dir Business Development Daniel Raterman, Dir Business Development Population Health Program/Christ Hospital	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Cincinnati/Dayton 08/06/19	Pharmacy Plans 101 <i>Love this 101 concept! Continue to expand.</i>	50	Nathaniel Hedrick, PharmD, Medical Mutual	1.5
Cincinnati/Dayton 08/27/19	Reference Based Pricing Health Plans – The Silver Bullet for Rising Healthcare Costs? <i>Most informative presentation that I've attended this year.</i>	60	Ron Bechtol, Sales, Custom Design Benefits Chris Shubard, Director, ELAP Services Shawn Wagoner, Bind On-Demand Health	1.5
Cincinnati/Dayton 09/03/19	Medicare 101 – From the Employer HR Perspective <i>Great topic, great presentation!</i>	35	Andy Stamas, Founder, Medicare Mindset, LLC	1.5
Cincinnati/Dayton 10/1/19	FSA / HRA / HAS Plans <i>Great series. My only suggestion is to alternate the dates of the 101 series so that other people can make it based on their schedules.</i>	40	Michelle Fowler, Comp Mgr, Ascensus Health Joe Rizzo, VP HR, Chard Snyder	1.5
Cincinnati/Dayton 11/05/19	Group Life Insurance Plans 101	15	Marty Hileman, The Standard Ins Co	1.5
Cincinnati/Dayton 12/03/19	Health Care Ate My 401(k) Contributions	15	Rocke Blair, CEBS, Partner, Fiduciary Analytics Peggy West, CEBS, Director, Formica Corp	1
Cincinnati/Dayton 12/10/19	Group Vision Plans 101	10	Alex Stothfang, Sr Exec Salesperson, EyeMed Vision Care	1.5
Cincinnati/Dayton 01/07/20	Fully Insured Group Medical Plans		Mark Kuhner, Acct Exec, UnitedHealthcare	1.5
Cincinnati/Dayton 02/04/20	Group Medical 201 (Self-Funded Plans)		James Hagen, VP Ohio, United Healthcare Neal Grode, Dir Acct Mgmt, United Healthcare	1.5
Cincinnati/Dayton 02/19/20	Legislative Update		Laura Ryan, Partner, Thomson Hine Kim Wilcoxon, Partner, Thomson Hine	2
Cincinnati/Dayton 03/03/20	Group Stop Loss 201 (Beyond the Basics)		Bill Barrett, Custom Design Benefits	1.5
Colorado 02/12/19	Point of View: The Economy, Markets and Investment Strategy (w/WP&BC)		Fritz Meyer, Economist and Market Commentator	1.5
Colorado 06/20/19	Managing the Wave of US Retirement, How Employers are Dealing with Longer Employee Careers		Barbara Stock Coletta, Sr Consulting Actuary, Willis Towers Watson	1
Colorado 10/09/19	Effective Benefit Communication Strategies		Melissa Burkhart, Founder/Pres, Futuro Solido	1
Dallas/Ft Worth 01/10/19	The Basics of Medicare	52	Leigh Bennett, IMA Waldman	1
Dallas/Ft. Worth 02/14/19	Rising Cost of Pharmacy	59	Carol Bailey, President/CEO, TEAM Pharmacy Consulting	1
Dallas/Ft. Worth 04/11/19	Unstable Unicorns: Separating Fact from Fiction Among the Hype-Fueled Vendor Landscape	24	Lee Lewis, Area VP, Arthur J Gallagher	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Dallas/Ft. Worth 05/09/19	Continuing Education (CE) Day <ul style="list-style-type: none"> • Stop Loss • ACA Updates • Ethics • HDHP Gap Plans • Identity Theft 	25	Guy Finley, Tokio Marine Eric Johnson, Comedy CE Gentrie Pool, CEBS, ConnectYourCare Paul Minca, Symetra Andrea Workman, InfoArmor	7
Dallas/Ft. Worth 06/13/19	401(k) Fiduciary landmines, investment Policy Statements and Financial Education	15	Brandon Day, Sr Advisor, 360 Wealth Management	1
Dallas/Ft. Worth 08/08/19	Benefits Hot Potatoes: How to Handle Some Touchy Benefits Issues Without Getting Burned!	35	Russ Chapman, Special Counsel, Littler	1
Dallas/Ft. Worth 09/12/19	Wipe Your Knowledge – Innovations in Healthcare	21	Wally Gomaa, Founder/CEO, ACAP Health	1
Dallas/Ft. Worth 10/10/19	How Stress can Catalyze Your Company's Growth	12	Sophie Clement	1
Dallas/Ft. Worth 11/14/19	Retirement Plan Trends and Hot Topics	24	Brad Altman, RPA, AIF, Marsh & McLennan Mechiel Lake, CEBS, Marsh & McLennan	1
Dallas/Ft. Worth 01/09/20	What Matters to Employees: The Real Deal		Jessi Ryan	1
Dallas/Ft. Worth 02/13/20	Employer Shared Responsibility Penalty Assessments		Kristen, Garcia, Counsel, Haynes and Boone	1
Dallas/Ft. Worth 03/12/20	OE Communication Best Practices and Trends		Cheryl Frost Sr Consultant, Milliman Julie Bentz, Sr Consultant, Milliman	1
Dallas/Ft. Worth 03/14/19	Convergence of Employee Benefits Today	34	Travis Cox, Managing Director, Emerging Markets, MassMutual Workplace Solutions	1
Des Moines 04/15/19	Solving the Leave Management Puzzle – Challenges and Best Practices	34	Jason Petsche, Sr Life & Disability Mgr, Guardian	1
Des Moines 08/14/19	2019 Symposium <ul style="list-style-type: none"> • Medicare in 2020 • Legal Update • Ethics Update • Retiree Ready-Preparing Employees for Retirement • Pharmacy Trends • How Company Culture Affects Motivation, Engagement and Advocacy 	70	Janis Van Ahn, Health Insurance Advisor Susan Freed, David Brown Law Firm Diana Huston, Principal Jason Wenzke, RxBenefits, Inc Rob Danna, ITA Group	5.5
Des Moines 12/11/19	Financial Well Being	18	Cory Jackson, Consultant	1
Detroit 04/04/19	Key Findings from the Willis Towers Watson Best Practice Survey	19	Jerome Konal, Senior Consultant, Willis Towers Watson	2

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Detroit 09/26/19	Retirement Plan Sponsor Roundtable		Gerald Wernette, CEBS, CPA, AIFA, Principal, Rehmann Wealth Retirement Solutions	3
Detroit 11/20/19	No-Fault Auto Insurance Changes <i>Information presented was delivered in a way that was easily understandable. Great job as always Tripp! Complex topic covered with vast knowledge and a bit of humor.</i>	31	Tripp VanderWal, Attorney, Miller Johnson	1
Georgia 01/31/19	Maximize Your Benefit Plans	18	Mike Stull, Chief Marketing Officer, Employers Health	1
Georgia 04/10/19	Flexing Your Benefits Package for the Modern Employee	20	Chloe Ruzick, VP, Acct Exec, Fallon Benefits	1
Georgia 06/27/19	Global Market Update and Trends in the Employee Benefit Marketplace	8	Don Schatz, Manager, Voya Investment Sadie Sherwood, Sr Sales Rep, Voya Emp Bnfts	1
Georgia 08/14/19	2019 Health Benefits Update	21	John Hickman, Practice Leader, Alston & Bird	1
Georgia 09/18/19	Leave of Absences	21	Amber Lewis, Principal, Mercer	1
Georgia 01/21/20	What to Expect in an EBSA Investigation		Alycyia Henderson, Supervisory Benefits Advisor, EBSA, USDOL	1
Greater Boston 02/08/19	Networking Session	6		1
Greater Boston 02/28/19	Guiding Clients through the Medicare Process		Barbara Deveau, State SHINE Assistant Director	1
Greater Boston 03/07/19	Networking Session			1
Greater Boston 04/05/19	Morning Networking Session			1
Greater Boston 05/02/19	Evening Networking Session			1
Greater Boston 09/19/19	Networking Event (discuss current topics)			
Greater Boston 11/07/19	Retirement	8		1
Greater Boston 12/06/19	Massachusetts FMLA	2		1
Greater Boston 01/09/20	Retirement Topics			1
Greater Boston 02/06/20	Innovative Benefit Offerings		Melissa Abbott, CFO, Mainstay	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Greater Boston 03/10/20	Networking Event	3		
Greater Phil 03/20/19	Webinar: Taking Control of Prescription Drug Costs, Strategies and a Roadmap to Success for HR Teams	OL: 38	Mike Appaneal, CEBS & Ryan Czado Lockton Companies	1.5
Greater Phil 05/21/19	Navigating the Complex Environment of Absence Management	55	Jim Huebner, Practice Leader, Reliance Standard Life	3
Greater Phil 08/08/19	Webinar: Impact of Opioid Misuse in the Workplace	OL: 30	Jill Goldstone, Area VP, Innovation, Gallagher	1
Greater Pitts 05/23/19	Benefits Day <ul style="list-style-type: none"> • Deskless Yet Informed • Human Capital and Benefits – A Value Proposition • Robotics and Artificial Intelligence • Paid and Unpaid Leave Laws – What do you need to know • Retirement Update • Voluntary Benefits from an Employer Perspective • Trends in Prescription Drugs • Consumer Engagement • Regulatory Update 	86	James Hanley, EeComm Andrea Goodkin & Mingee Kim, HUB Intl Atif Abbas & Tracy Brady, Highmark Health Patrick McAllister, Henderson Brothers Drew Fletcher, Willis Towers Watson Rahul Anand, Highmark Health Amber Blackwood, UPMC Shannon Mincemoyer, Reed Smith	8
Greater Pitts 11/15/19	Benefits Morning <ul style="list-style-type: none"> • Health Plan Risk Management: Why are my stop loss rates increasing so much? • Retirement and Welfare Plan Developments • Holistic Financial Wellness – Why and how to help your employees • Individual Coverage HRAs and the Individual Market; The Future of Employer-Sponsored Coverage 	54	Abigail Caldwell, FSA, MAAA, AmWins Group Mike Hopkins, Stealth Partner Group Allison Sizemore, Reed Smith Allison Whitney&Rachel Hawili, Hefren-Tillotson Alan Silver, Willis Towers Watson	4
Houston 04/09/19	Wellness Champions – A Success Story		Janice Porter, CEBS, Director, McKesson Specialty Health	1
Houston 05/09/19	Webinar: Disrupting the Opioid Addiction Cycle		Ted Bordstadt, CEO, TrestleTree Julia Nicholson, Principal, J/N Consulting	1
Houston 07/18/19	Benefits Bootcamp <ul style="list-style-type: none"> • Different types of tax-favored health plan savings & funding accounts • Common pharmacy benefit structure and cost management techniques • Wellness program compliance considerations • Annual enrollment process • HIPSS compliance basics • Health plan compliance – the ABC's of federal regulation • Responsibilities of retirement fiduciaries 		Lisa Hollins, CEBS, Hollins Consulting Wendy Carmichael, USI Insurance Services Carl Pilger, EPIC Matt Adams, Gallagher Carol McBride, Germania Erin Millikin, EPIC Rich Eager, Qualified Plan Advisors	7
Houston 08/21/19	What is Next for the Affordable Care Act		Ron Krupa, CEBS, Ernst & Young Lindsay Rice, Ernst & Young	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Houston 09/24/19	Webinar: V is for Vendor: Managing Privacy and Security Risks of Vendor Relationships		Petula Workman, JD, CEBS, Arthur J Gallagher	1.5
Houston 10/09/19	Webinar: Designing and Implementing a Student Loan Assistance Benefit	12	John Eshleman, CEBS, Memorial Hermann Health System	1.5
Houston 11/13/19	Money Matters and the Millennial Mindset		Robin Loos, CEBS, Wood PLC	1
Kansas City 03/26/19	ACA Recap and Roundup: Where are we now?	9	Edward Fensholt, Sr VP, Dir of Compliance Services, Lockton	1
Kansas City 06/26/19	Wellness Strategies that Work		Susan Steiner, Lewer Companies Jana Goolsby, City of Olathe Emma Tapscott, Cerner Corp.	1.5
Kansas City 08/22/19	Ethics and Compliance Workshop		Brock Glessner, Dir of Sales, Principal Jennifer Burke, Sr Emp Specialist, Principal	2
Kansas City 10/23/19	Webinar: Retirement Plan Investment Basics		Vern Cushenbery, CFS, CPA, CIO, @Two West	1
Kansas City 11/13/19	The Future of the Total Rewards Industry (w/Total Rewards KC)		James Klein, President, American Benefits Council	1
Los Angeles 02/06/19	2019 Legislative Update		Marilyn Monahan, Owner, Manahan Law Office	1
Los Angeles 03/27/19	PBM Transparency: Seeing through the marketing, headlines, and optics		Mike Stull, Chief Marketing Officer, Employers Health	1
Los Angeles 05/22/19	Why Aren't All Dental Claims Being Paid?		Paul Manos, DDS, Dental Director, United Concordia Dental	1
Los Angeles 09/11/19	Simplifying Leave of Absence Management		Daris Freeman, AVP Legal Counsel, Unum	1
Los Angeles 01/29/20	2020 Legal and Compliance Update		Marilyn Monahan, Attorney, Monahan Law Office	1
Louisville 04/25/19	Benefits of Telecommuting for the Future of Work	8	Rebekah McGuire Dye, J.D., VP Legal Operations, Equian LLC	1
Louisville 06/13/19	Delivering a Successful Parental Leave Policy	13	Gayle Hobson, Yum! Brands	1.5
Louisville 08/21/19	Hot Trends in Benefits...Retirement, Compensation and Regulatory Sick and Safe Leave Laws	25	ARGI Financial, MCM PCAs & Advisors and Willis Towers Watson	4
Milwaukee 01/17/19	The IRS Outlook for Retirement Plans	IP 30 OL 13	Steven Grieb, JD, CEBS, Director, Empower Retirement	1.5
Milwaukee 05/08/19	Rare Disease Therapies \$500,000 and Higher: Plan Sponsors Take Warning!	39 IP 4 OL	Ryan Siemers, CEBS, Principal, Aegis Risk	1.5

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Milwaukee 09/24/19	Emerging Trends in Tuition Reimbursement and Student Loan Repayment Benefits	IP 33 OL 28	Justin Held, CEBS, Sr Research Analyst, IFEBP Julie Stich, CEBS, VP Content, IFEBP	1.5
Milwaukee 12/12/19	Employee Benefits Law Update	58	Charles Stevens, Michael Best	1.5
Milwaukee 01/14/20	Disrupting Health Care Through High-Value Providers	58	Sara Hames, CEBS, VP, Hays Companies	1.5
Milwaukee 04/15/20	Webinar: ERISA Fiduciary Best Practices <ul style="list-style-type: none"> • Legal Update on Current Litigation • Managing Fiduciary Liability 		Mike Poludniak, VP, Merrill Lynch Dan Simandl, Attorney, von Briesen & Roper	1
Nebraska 04/25/19	Promoting Financial Wellbeing in a Diverse Workforce (Presented by Willis Towers Watson)	40	Alec Dike, Sr Dir, Willis Towers Watson Amy Houseman, Dir, Willis Towers Watson Jennifer Lewis, Sr Dir, Willis Towers Watson Crystal Meyer, Dir HR, Ameritas	3
Nebraska 09/27/19	Innovation Day: How Voluntary and Niche Health Services are Changing the Benefits Landscape	12	Kristen Willey, MBA, GBDS Miles Hunke, CEBS Bradley Smith, RHU	1
Nebraska 02/04/20	The Health Care Affordability Challenge and its Impact on Active and Retiree Wellbeing		Amy Housman, Dir, Willis Towers Watson Regina Ihrke, ASA, MAAA, Dr Dir, Willis TW Annie Rzepecki, Dir, Willis Towers Watson	3
New York Metro 02/20/19	Retirement Plans – The Changing Fiduciary Landscape	28	Steve Bogner, Treasury Partners	1.5
New York Metro 03/28/19	Evolving Funding Options for Employee Benefit Programs	28	Rosemary Manning Hughes, Principal, EPIC Brokers	1.5
New York Metro 04/17/19	Employee Benefit Plan Audit Readiness	19	Cindy Rosenberg, CPA, Managing Director, CBIZ	1
New York Metro 05/15/19	Current Trends in Voluntary Benefits	24	Andrew Friend, Sr VP, Voya Financial	1
New York Metro 06/13/19	Form 5500 and Related Reporting and Compliance Matters	24	Louis LiBrandi, CEBS, Principal, Emp Bnfts Srvc PKF O'Connor Davies	1
New York 09/24/19	Important Pharmacy Updates and Emerging Rx Trends	14	Bill Nulman, Area VP, Gallagher	1.5

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
New York Metro 10/07/19	Benefits 360: Maximize Your Employer-Sponsored Benefits (Full Day) <ul style="list-style-type: none"> Thriving in the New Work-Life World Prevention in the Workplace: Extending the lives of your employees and avoiding catastrophic health insurance claims Moving Parts of a Retirement Plan: Cybersecurity Solving the Leave Management Puzzle: Challenges & Best Practices Fiduciary Focus Legislative Update 	7	Marly Perou, Acct Exec, MetLife Dr. Lisa Reeves, Medical Director, & Amir Saul Mansour, CEO, Doctors in the Office John Russon, Regional VP, Empower Rtrmnt Marc Schein, CIC, CLCS, Marsh & McLennan Gene Lanzoni, Asst VP, Guardian Jennifer Lyons, Marketing Mgr, Guardian Richard Rowehl, Rtrmt Spec, Marsh & McLennan	6
New York Metro 10/08/19	Single Payer and State Individual Mandate Developments	16	Priya Setty, Attorney, Alliant	1.5
New York Metro 10/23/19	U.S. Department of Labor Update		Darren Cohen, Regional Director, EBSA Lois La Londe, Supervisory Advisor, EBSA	1.5
New York Metro 11/14/19	A New Life for Variable DB Plans		Jay Egelberg, ASA, FCA, MAAA, EA, Consulting Actuary, First Actuarial Consulting (FACT)	1
New York Metro 12/12/19	One Employer's Journey to Implementing a Student Loan Repayment Benefit		Jill Mongelluzzo, GBA, Director, National Grid	1.5
New York Metro 01/23/20	International Health Care Systems and Wellness Trends		Allen Koski, CEBS, VP, UnitedHealthcare Global	1.5
New York Metro 02/25/20	Fully Insured to Self-Insured: What to Consider and When to Consider It		Mike McGee, SVP, Analytics, NFP Mike DiMaiolo, Asst VP, NFP	1.5
Northeast Ohio 04/11/19	The Cost/Benefit of a Psychologically Healthy Workplace <ul style="list-style-type: none"> Intro to Psychological Health Creating a Psychologically Healthy Workplace Strategic Roundtable Discussion 		Dr. Joel Gecht, Pres/CEO, IMPACT Solutions Kim Hauge, Dir Employee Wellness, Kent State Marc Blaushild, Pres/CEO, Famous Supply Rebeca Rhubottom, VP, Nationwide Insurance Sharon Johnson, Director, Nationwide Insurance Christine Young, MSSA, LSW, Ernst & Young	3
Northeast Ohio 09/12/19	Total Rewards: Evolving Reward Approaches for a New World of Work		Christa Manning, Dir, Ultimate Software Pete DeBellis, Research Leader, Deloitte	3.5
Northern CA 05/14/19	How Applying Human Capital Risk Management Will Revolutionize Benefits	15	Hugh O'Toole, CEO, Innovu, LLC	1.5
Northern CA 10/10/19	QPR (Question, Persuade, Refer) Detection and Management of Severe Emotional Distress and Suicidal Ideation in the Workplace <i>(Met expectations very well and educational content was excellent.)</i>	22	Dr. Elizabeth Johnson, Psychologist	2

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Northern CA 11/21/19	Federal & State Health Care Policy Update 2019 Cybersecurity for You and Your Company	9	Gary Cohen, VP, Government Affairs, BS of CA Martin Fox-Foster, Director Claims, G2 Insurance Shirley Gordaon, CRM, Dir, G2 Insurance	2
Northern CA 02/26/20	Ethical Behavioral Finance Retirement and Health Plans		Rick Storms, CEBS, Client Srvcs Mgr, Alerus	1
Northern NJ 05/23/19	Health and Welfare Compliance Update	19	Trish Farrell, Mercer	1.5
Northern NJ 07/09/19	Form 5500 and Related Reporting and Compliance Matters	16	Louis LiBrandi, CEBS, Principal, PKF O'Connor Davies	1.5
Northern NJ 10/15/19	QDROs-More Than Just Marital Property	11	Louise Chambers, Pres, Chambers QDRO Consulting Services	1
Northern NJ 11/19/19	2020 Compliance Updates and New Paid Family & Medical Leave Laws	14	Arthur Grutt, CEBS, Managing Partner, Cambridge Insurance	1
Pacific NW 01/30/19	Benefits Bootcamp, Employee Benefits 101 <ul style="list-style-type: none"> • Why Employers Offer Benefits • A Brief History of Employee Benefits • Medical Program Design/Networks/Funding • Other Lines of Coverage, from Dental to Disability • Compliance – Section 125, ERISA, COBRA, HIPAA • Reform – Affordable Care Act 	38	Kirk Czonstka, GBA, Principal, Mercer Manuel Mendoza, JD, VP, USI West Jessica Carbullido, VP, Columbia Sportswear	4
Pacific NW 03/06/19	Ten Tips for Tackling a PBM Contract Negotiation	83	Josh Golden, Area Senior VP, Solid Benefit Guidance	1
Pacific NW 04/30/19	The 2018 Mercer Survey, Health Benefit Trends & Insights You Can Use in 2019	203	Kirk Czonstka, GBA, Office Business Leader, Robert Valdez, Lead Consultant, Mercer	1
Pacific NW 06/06/19	Webinar: Rare Disease Therapies Over \$500,000	71	Ryan Siemers, CEBS, Principal, Aegis Risk	1
Pacific NW 07/17/19	Webinar: Operational Risk: Ensuring that the Achilles' Heel of Retirement Plans is on Good Footing	118	Sean Mahon, CEBS, Sibson Consulting	1
Pacific NW 09/17/19	2019 Retirement Bootcamp (Salt Lake City, UT) <ul style="list-style-type: none"> • Retention of key employees in today's ultra-competitive employment environment • A day in the life of a plan fiduciary • Generational differences in retirement planning • Bringing it all together – best practices for retirement plan committees 	16	Kirk Welch, Principal Zac Huish, VP, Wealth Management Grant Halvorsen, VP, Retirement Plan Consulting Angie Mirrione, VP, Retirement Plan Consulting Charlotte Macfarlane, Client Relationship Mgr Doug McDonald, Associate Advisor	4
Pacific NW 10/29/19	Webinar: Unlimited PTO	OL 145	Laura Earley, CEBS, Account Exec, IMA Financial	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Pacific NW 11/21/19	Webinar: 2019 Legal & Legislative Update for Retirement Plans <i>More contents on the slides would have been helpful. I appreciate the technical knowledge shared. A lot of very detailed information was provided.</i>	140	Bethany Bacci, Partner, Stoel Rives	1
Pacific NW 12/11/19	Webinar: 2019 Legal & Legislative Update for Health and Welfare Plans	228	Wade Symons, JD, CEBS, Partner, Mercer	1
Pacific NW 01/08/20	Webinar: Retirement Readiness, Using 2020 Vision in Planning for Retirement	107	Cynthia Boman Thompson, MS, CFP, President, Financial Planning Association	1
Pacific NW 02/05/20	Sightlines – A Clear Look at Pharmacy Benefits		Mike Stull, CSO, Employers Health	3
Richmond 04/11/19	Medicare Education	16	Carolyn Smith, Market Place Insurance Agency/ Eldercare Associates	1
Richmond 06/13/19	Half Day Session <ul style="list-style-type: none"> • Diversity and Inclusion • Workplace Sexual Harassment • Mercer Survey 	22	Mike Gree, Cigna Tina Stevens, Virginia Municipal League Amanda Weaver Williams Mullen Ken Jeffries, Mercer	3
Richmond 09/19/19	Half Day Session <ul style="list-style-type: none"> • Financial Wellness • Identity Theft • Financial Flexibility • Financial Planning and Student Loans 		Alok Deshpande Lindsay Meadows, Willis Towers Watson Joan Dyer, CITRMS Christy DeFrain, VP Sales, Purchasing Power	4.5
Richmond 11/14/19	Dooley Mansion		Krista Westherford, Maymont Foundation	1
St. Louis 04/04/19	Exploring Benefits Administration Strategies – Benefits Administration Panel Discussion	22	Lee Ann Harris, MEd, SHRM, Ex Dir, Mercy Mary Skaggs, VP, MetLife Matt Smith, VP, HM Benefits	1
St Louis 07/18/19	Benefits Administration Panel Discussion - Cigna and Express Establish a Blueprint to Transform the Health Care System		Kevin Weber, PharmD, Cigna John Vollmer, CEBS, CLU, ChFC, Willis Towers Jeff Eichholz, PharmD, Lockton (moderator)	1
St. Louis 10/1/19	Panel Discussion on Retirement Plan Audits	18	Sarah Roe Sise, Partner, Armstrong Teasdale Emily Conley, CPA, Prncpl, BrownSmithWallace Ethan McWilliams, MBS, Sr Compliance, Lockton	1
SW Ontario 04/04/19	Private Insurers Negotiating Drug Prices – Biologics, Biosimilars and the Transition Program		Kevin O'Connor, Dir, Janssen Inc. Ned Pojskic, Leader, Green Shield Canada	2.5
SW Ontario 05/15/19	Fundamentals of Pensions and Group Benefits			6

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
SW Ontario 10/08/19	Emerging Pension and Retirement Plan Trends		Robert Tangney, CEBS, Consultant Jeffrey Hodgson, Dir, Industry and Stakeholder Michelle Oram, CEBS, Guidance, Manulife	3.5
SW Ontario 11/26/19	The Future of Work is Here!	22	Simon Chan, VP, Talent, Communitech	1.5
Tampa 05/21/19	Benefits Communication to Improve Employee Engagement and Decision Making – All Year Long	25	Paula Krupa, CEBS, Dir, Roper Technologies Rita, Harris, VP Sr Consultant, Segal Benz	1
Tampa 08/08/19	Why is a Student Loan Reduction Benefits Program a “Must Have” for Your Organization?		Sheri Ferguson, CEBS, CFP, AWMA, CRPC John Slevin, Integrity Data, GotZoom Student Loan Debt Relief	1
Tampa 03/12/20	Self-Insured Health Plans? A Risky Business Without Claim Data Analytics		Jeff Gasser, CEO, Deerwalk Inc Don Ross, Founder, Med-Vision/Med-View	1
Toronto 03/27/19	The Medicalization of Unhappiness	35	Peter Gove, Innovation Leader, Green Shield Kristen Coady, Ntl Disability Mgmt Ldr, Morneau Shepell	2
Toronto 05/30/19	Fundamentals of Group Benefits <ul style="list-style-type: none"> • Health & Dental Plans • Life Insurance • Disability • Ancillary Benefits (HAS, Flex, EAP, Wellness) • Underwriting 101 	21	Nick Landry, CEBS, CHS, RCIS, BFL Canada Bisrat Brown, CEBS, Medavie Blue Cross Nicole Stibbe, BSc, CDMP, Morneau Shepell Lizann Reitmer, CEBS, Buck Teri Thompson, CEBS, Sun Life Financial	6
Toronto 05/31/19	Fundamentals of Pension Plans <ul style="list-style-type: none"> • Governance-Best Practice and Related Legal Issues • Setting up and Administering a Pension Plan • Social Programs and Private Plans • Asset Management • Communication for Capital Accumulation Plans (CAP) 	10	Mitch Frazer, Torys, LLP Jill Milner-Yi, FSA, ACIA, OTPP Huzefa Hamid, The Leslie Group Limited Joseph Bevilacqua, Mercer Alyssa Hodder, Ecker Ltd.	6
Toronto 11/05/19	Data Integration & Machine Learning: What’s Possible Today & What’s Coming in Health Benefits	31	Mike Sullivan, CEO, CUBIC Health	1
Toronto 04/01/20	Webinar: Big DB and DC Developments: New Standard for pension commuted values and DC decumulation options		Faisal Siddiqui, FSA, FCIA, People Advisory Srvc Carol Wong, FSA, FCIA, People Advisory Srvc Michelle Oram, CEBS, Manulife	3
Twin Cities 01/30/19	New Year, New Day – Current State of the ACA	40	Allison Manno, EVP-Compliance, Health e(fx) Kathi Wright, Principal, Gray Plant Mooty	1
Twin Cities 02/27/19	The Rise of Digital Health and its Impact on Benefits	72	Matt Dunn, Sales Dir, Omada Health Konstantin Mehl, Founder/CEO, Kaia Health Dale Cook, Co-Founder/CEO, Learn to Live	1
Twin Cities 03/27/19	Integrated Wellbeing – Bringing it All Together – An Employer Panel	77	Jeanine Miaktonia, Wellbeing Mgr, Allina Health Amy Bloomquist, Wellness Mgr, Land O’Lakes	1

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
Twin Cities 04/24/19	Planning for the Future: Fundamentals on Medicare and Social Security	81	Mary Kesel, CEBS, President, Benefit Advocates	1
Twin Cities 05/16/19	2019 Employee Benefits Seminar <ul style="list-style-type: none"> • Fundamentals • Contemporary Issues 	86	14 Speakers	6
Twin Cities 06/20/19	Trust and Behavioral Finance: Ethical Habits to Reinforce Trust in Business Relationships	30	Rick Storms, CEBS, Client Services Manager, Alerus	3.5
Twin Cities 08/28/19	The Retirement Landscape Has Changed – Are Plan Sponsors Ready?	56	Cheryl Ouellette, Spec Master, Rewards, Deloitte Scott Manson, Manager, Rewards, Deloitte	1
Twin Cities 09/25/19	International Health Care Systems and Wellness Trends	49	Allen Koski, CEBS, VP Global Solutions, UnitedHealthcare Global	1
Twin Cities 10/30/19	Employee Plans Correction Resolution System	30	Mary Komornicka, CEBS, Attorney, Larkin Hoffman	1
Twin Cities 11/20/19	Hot Topics from the 2019 ISCEBS Symposium	41	Janis Koltun, CEBS, Principal, Mercer Hud Peters, CEBS, Sr Consultant, Willis Towers Lara Pischke, CEBS, Sr Bnfts Consultant, Hays Deb Rosenberg, CEBS, Dir Retirement Plan Consulting, Stiles Financial Services	1
Twin Cities 01/29/20	The Opioid Crisis: What Employers Need to Know		Dr. Joseph Lee, Hazelden Betty Ford Fndtn Bob Poznanovich, Hazelden Betty Ford Fndtn Sherry Welliver, Mercer	1
Twin Cities 02/26/20	The SECURE Act Decoder		Kat Lacy-Wilson, JD LLM, Consultant, ABRC	1
Web Coalition 02/25/20	Reference-Based Pricing “Myths and Realities” (PNW)	269	Donald Reiman, Founder, Pres, Echelon Group	1
Web Coalition 03/05/20	SECURE Act (KC)	266	Gergory Ash, Parnter, Spencer Fane	1.5
Web Coalition 03/26/20	Health & Wealth Section 125 Nondiscrimination Testing (PNW)	195	Leonard Spangher, CEBS, VP & Sr Health Consultant, The Segal Group	1
Web Coal 04/22/20	The 2019 Mercer Survey Results (PNW)		Kirk Czonstka, GBA, Office Bus Ldr, Mercer Nick Albert, FSA, MAAA, Sr Assoc, Mercer	1.5
Web Coal 05/12/20	Canada, Eh? Dispelling the Myths of Canadian Health Plans		Kandy Cantwell, CEBS Partner, Montridge Advisory Group Ltd.	1
Web Coal 06/09/20	The Importance of Employer-Sponsored Income Protection Plans (PNW)		Adam Aschoff, CEBS, FLMI, FFS, Regional Director of IDI Sales, Standard Insurance	1
West Michigan 02/20/19	Michigan Paid Medical Leave Law	21	Sarah Willey, Attorney, Miller Johnson	1.5

CHAPTER/DATE	PROGRAM	ATTND	SPEAKER(S)	CEBS HOURS
West Michigan 05/22/19	Retirement Readiness	19	Paul Staples, Partner, Mercer	1.5
West Michigan 11/20/19	Latest Legislative Updates		Norbert Kugele, Partner, Warner Norcross+Judd Justin Stemple, Partner Warner Norcross+Judd	1.5