

SESSION

February 22, 2018
11:00am – 1:00pm

Eide Bailly

877 W. Main Street, Suite 800
Boise ID 83702



President: Kelly Belden, Empower Retirement
Program Chair: Bret Linton, Milliman
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Safe Harbor 401(k) Plan Corrections

Stephen Forbes

Join us for another webinar from the WPBC. Lunch will be ordered and, as a group, we will have the opportunity to discuss any questions amongst ourselves. In addition, we have negotiated a discounted rate of \$40 (instead of \$50), if attending as a group at the Eide Bailly offices.

Registration for the event closes on Monday, February 19, 2018

Register at www.wpbcboise.org

About Our Speaker:

Stephen is an **ERISA attorney and educator** with 32 years of experience practicing and teaching in the retirement plan area. Stephen recently returned from a three-year sabbatical where he presided over a mission for his church. Previously, Mr. Forbes was **vice president of SunGard Relius** in charge of Relius Education. At SunGard, he taught seminars, conferences and web seminars on retirement plan compliance, design and correction. He also helped **draft qualified plan, 403(b), 457(b), 409A and IRA documents** and other forms. He was the author of all of the editions of “The Form 5500 Filing Guide” and the co-author of “The Pension Library.” Mr. Forbes came to SunGard in the acquisition of Pension Publications of Denver, Inc. where he served as Vice President. Previous to working for PPD, he was a **Tax Law Specialist at the National Office of the Internal Revenue Service**(Employee Plans Division) where he worked with Master/Prototype Plans, trained IRS employees, wrote IRS Notices and Revenue Rulings and participated in several Treasury regulations committees.

After receiving his bachelor’s degree, Steve graduated from Willamette College of Law. He then went on to obtain a Masters of Law degree in Taxation from the George Washington Law Center.

The webinar will provide two continuing education credits for ASPPA, NIPA, JBEA, ERPA, MCLE CA, CPA CE for CA and OR. AIF and CFP pending.

You may also mail this registration form and payment to Patricia Schirmer, WP&BC, 2289 S Bonito Way, Meridian ID 83642

Members Attending: _____ @ \$40 per person*
Non-Members Attending: _____ @ \$55 per person*
Name(s): _____
Company/Organization: _____
Email : _____ Phone: _____

Lunch will be served.

*All cancellations must be received at least 3 days prior to the event. If a cancellation is timely received, the attendee will receive a refund, less a \$10 processing fee. If a cancellation is received less than 3 days prior, the attendee will not receive any refund.