



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

## **Form 5500 Presentation**

Many employee benefit plans have filing requirements which generally include the filing of a Form 5500, required Schedules, and other attachments with the Employee Benefits Security Administration (EBSA). A discussion of all the materials required to be filed, the uses of the information by the regulatory agencies, providing responses to the DOL and IRS Notices, amended filings, and other related filing matters will be provided. 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.

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

### Speaker

**Louis F. LiBrandi, CEBS, 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 the coordination and preparation of the filings of a few large clients employee benefits plans with the EBSA. He also works on the preparation of VCP applications, performs compliance reviews of all type of employee benefit plans and related processes (i.e., payroll, and tax reporting). Other areas of his services include preparing/reviewing plan documents for cafeteria plans, 'wrapped plans', and SPDs, as well as terminating all types of plans and obtaining determination letters.

Louis received an accounting degree from Long Island University and has subsequently earned various designations. He has practiced for over 13 years after leaving the Internal Revenue Service as an Agent in the Employee Plans Division. Initially for KPMG's Compensation & Benefits Practice as a Senior Manager, and currently a Director at McDermott.

Louis is a member of the Board of Directors of the New York Chapter of CEBS, and a member of the AICPAs Tax Task as a reviewer of the Form 5500. He previously has instructed CEBS classes at The College of Insurance and Hofstra University. Recently he has co-authored two (2) articles with McDermott Employee Benefit Partners. The topics included the process of 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 effecting 403(b) plans.

**Date:** May 21, 2008

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

Refreshments will be provided

**Presentation / Q & A from 8:35 AM – 10:00 AM**

### **Meeting Location and Directions:**

McDermott Will & Emery LLP

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

2<sup>nd</sup> Floor Rooms Astor & Broadway

New York, NY 10173

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



## *Registration Form*

### **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 16, 2008 (5pm)**

**Tax ID #: 13-3293220**

**Registration by Mail:**

New York Metro Area Chapter – ISCEBS  
c/o Silent Secretary  
P.O. Box 381  
Stanhope, NJ 07874

**Registration by Telephone/Fax/E-Mail:**

Telephone/Fax: (973) 448-0022  
E-Mail: [Silent@worldnet.att.net](mailto:Silent@worldnet.att.net)

Prepayment preferred. However, if you do not expect your check to arrive by May 21, payment should be sent in mail upon registration. Please remember to include your fax number in order to receive a confirmation. Confirmations will be faxed one week before the meeting.

**For questions please contact:**

Phillip Wismar  
Aon Consulting, Inc.  
212-441-2417

*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.*