



2007 REGISTRATION BROCHURE

2007 Annual Meeting

To Serve Well...Be Well

Scottsdale, Arizona, November 27 - November 29, 2007

Scottsdale Plaza Resort

November 27 - 29, 2007

Pre-Registration Deadline: Friday, November 2, 2007

A Letter from the CBA Planning Committee Chair

Greetings to all CBA Members:

The Planning Committee is excited to welcome you to beautiful Scottsdale for the 93rd Annual Meeting of the Church Benefits Association (CBA). The CBA Membership includes 48 denominational pension plans which provide retirement security and other benefits to tens of thousands of church workers in the United States and Canada. This meeting is a great opportunity to learn what others are doing, to share what your organization is doing and to discuss matters of mutual interest. It is also a special time to form new friendships and renew those of long standing.

Our opening dinner will be at the Heard Museum, where we will have the opportunity to view one of the finest collections of southwest Native American Indian art.

Our topical interest committees will have something for everyone. The subjects include information technology, retirement benefits, health benefits, communications, and investments.

We will hear from several distinguished speakers, including Dan Hotchkiss, Senior Consultant from the Alban Institute; speaking on this year's theme "To Serve Well...Be Well." We will also hear from some notable investment experts during one of our Plenary Sessions and hear from the Honorable Bill Thomas, former Congressman and Chairman of the House Ways and Means Committee and Lowell B. Catlett, PhD during our Closing Plenary with the Church Alliance.

We look forward to seeing you in Scottsdale.

Michael A. Downs
CBA Planning Committee Chair

Program at Glance

Tuesday, November 27, 2007

Registration

7:00 am - 6:00 pm

Golf Outing

7:00 am - 12:00 pm

McCormick Ranch - Off-Site

Pre-Conference Vendor Meetings

Open To All Attendees

8:00 am - 1:45 pm

8:00 am - 9:00 am

Cigna Behavioral Health

9:15 am - 10:15 am

Highmark Blue Cross/Blue Shield

10:30 am - 1:45 pm

Medco

Sponsored Lunch

10:30 am - 1:45 pm

Express Scripts

Sponsored Lunch

Pre-Conference Meetings

2:00 pm - 5:00 pm

- Information Technology Topical Interest Committee
- Communications Topical Interest Committee
- Retirement Benefits Topical Interest Committee
- Health Benefits Topical Interest Committee

Church Alliance Steering Committee Meeting

3:00 pm - 4:00 pm

Off-Site Dinner

5:30 pm - 9:30 pm

The Heard Museum

2007 Annual Meeting

To Serve Well...Be Well

Scottsdale, Arizona, November 27 - November 29, 2007

Program at Glance (Continued)

Wednesday, November 28, 2007

Registration

7:30 am - 5:00 pm

Coffee Service

7:30 am - 8:00 am

Welcome

8:00 am - 8:05 am

*Michael A. Downs, CBA Planning Committee Chair,
United Church of Christ*

Opening Devotional

8:05 am - 8:30 am

Reverend Dan Yeary, North Phoenix Baptist Church

CBA Annual Business Meeting

8:30 am - 9:00 am

*Barbara A. Boigegrain, CBA Board of Directors Chair,
The United Methodist Church*

Report of Significant Developments

9:00 am - 10:00 am

*William L. Walz, CBA Planning Committee Vice-Chair,
Christian Brothers Services*

Coffee Break

10:00 am - 10:30 am

Keynote Speaker Session

10:30 am - 11:30 am

Dan Hotchkiss, Alban Institute

Investments Panel Discussion

11:30 am - 12:30 pm

Moderator: *Curt Fee, Evangelical Lutheran Church in
America*

Panelists: *Spencer Glendon, Wellington Management
Company; Paul McCulley, Pacific Investment
Management Company*

Group Lunch

12:30 pm - 1:45 pm

Breakout Session I

1:45 pm - 3:15 pm

- Retirement Benefits Breakout Session I
- CEO Breakout Session
- Health Benefits Breakout Session
- CFO Breakout Session

Coffee Break

3:15 pm - 3:45 pm

Breakout Session II

3:45 pm - 5:15 pm

- Retirement Benefits Breakout Session II
- Legal Breakout Session
- Investments Breakout Session
- Communications Breakout Session

Free Evening

Thursday, November 29, 2007

Coffee Service

7:30 am - 8:00 am

Welcome/Opening Devotional

8:00 am - 8:15 am

*Rabbi Stephen Kahn, Senior Rabbi, Congregation
Beth Israel*

Church Alliance Annual Meeting

8:15 am - 8:30 am

8:30 am - 9:30 am

*Honorable Bill Thomas, former Congressman and
Chairman of the House Ways and Means Committee*

Coffee Break

9:30 am - 10:00 am

10:00 am - 11:00 am

Lowell B. Catlett, PhD

Closing Remarks

11:00 am - 11:05 am

*Michael A. Downs, CBA Planning Committee Chair, United
Church of Christ*

Please view www.churchbenefitsassociation.org for the most up-to-date information on speakers.

2007 REGISTRATION BROCHURE

Speaker Descriptions

Keynote Speaker

Dan Hotchkiss, Author and Congregational Consultant, Alban Institute

Dan Hotchkiss has consulted with hundreds of churches and synagogues across the American religious spectrum on a wide variety of issues. Some areas where Dan is currently focusing his writing, teaching, and consulting include planning, governance, clergy coaching, and financial assessment.

Investment Panel Speakers

Spencer Glendon, PhD, Senior Vice President, Partner, and Director of Global Macro Analysis Research, Wellington Management Company

Spencer is the director of the Global Macroanalysis Research Group at Wellington Management. The Group helps shape the economic, corporate, and political outlook of the firm's portfolio managers, analysts, and clients. In addition to his responsibilities as director, Spencer pursues an active research agenda. As a specialist on greater China, he researches the structural and cyclical changes in China to provide insights to investing both in Asia and around the world. In addition, he is responsible for leading the Macro Group and the firm in analysis and discussions of global issues. His research includes topics such as commodity demand in emerging markets, international trade dynamics, and capital market development.

Paul McCulley, Managing Director, Pacific Investment Management Company

Mr. McCulley is a Managing Director, generalist portfolio manager, member of the investment committee and head of PIMCO's Short-Term Desk. He also leads PIMCO's Cyclical Economic Forum and is the author of the monthly research publication *Global Central Bank Focus*. Mr. McCulley joined PIMCO in 1999, previously serving as Chief Economist for the Americas for UBS Warburg. During 1996-98, he was named to six seats on the Institutional Investor All-America Fixed Income Research team. He has 22 years of investment experience and holds a bachelor's degree from Grinnell College and an MBA from Columbia University Graduate School of Business. He recently co-authored *Your Financial Edge* released June 2007.

Devotional Speaker

Rabbi Stephen Kahn, Senior Rabbi, Congregation Beth Israel

Rabbi Stephen Kahn was born in San Francisco, CA. After receiving his BA in politics from the University of California, Santa Cruz, Rabbi Kahn attended the Hebrew

Union College-Jewish Institute of Religion where he was ordained as a rabbi in 1995. He became Senior Rabbi of Congregation Beth Israel in July 2003. In addition to his rabbinic duties at the Congregation, Rabbi Kahn is a member on the regional boards of the American Israel Public Affairs Committee (AIPAC) and the Anti Defamation League (ADL).

Church Alliance Speakers

Honorable Bill Thomas, former Congressman and Chairman of the House Ways and Means Committee

William Marshall Thomas, commonly known as Bill Thomas, was a Republican member of the United States House of Representatives from 1997 - 2007, representing the 22nd District of California. He last served as the Chairman of the powerful House Ways and Means Committee, and retired to private life at the end of the 109th Congress.

Lowell B. Catlett, PhD

Dr. Lowell Catlett is a Regent's Professor of economics, agriculture and genetic engineering at New Mexico State University where he became Dean of the College of Agriculture and Home Economics in January 2006. He is an exciting futurist whose knowledge of technologies and their implications on the way we will live and work is addressed in his varied and upbeat presentations which he delivers both nationally and internationally.

Investments Plenary Session Description

Moderator: Curt Fee, Evangelical Lutheran Church in America

Panelists: Spencer Glendon, Wellington Management Company; Paul McCulley, Pacific Investment Management Company

Two respected strategists representing well-known investment management firms will comment on current issues regarding investments and the global economic environment. The session will be conducted using a moderated question and answer format with both pre-selected questions and an invitation for questions from the audience.

2007 Annual Meeting

To Serve Well...Be Well

Scottsdale, Arizona, November 27 - November 29, 2007

Pre-conference Meetings Descriptions

• Information Technology

Moderator: Tom Drez, Christian Brothers Services

The purpose of the IT Group is to leverage our business and technology experience and knowledge to better support the missions of our organizations. This session is a forum for sharing ideas and information pertaining to current initiatives, discussing and evaluating technological trends and innovations that can add value, and soliciting outside experience to further augment our knowledge in new and emerging technologies relevant to our operations. This session is open to everyone that wishes to attend.

• Communications

"Speed Learning: An Interactive Dialogue on Best Practices in Benefits Communication and Education"

Moderators: Cindy Beach, The Presbyterian Church (U.S.A.), Jennifer L. Schoettle, The Presbyterian Church (U.S.A.)

You may have heard of the new dating technique called "Speed Dating" but have you heard about "Speed Learning?" Join your communication and education colleagues at the pre-conference session and fasten your seatbelts for a fun, fast, and exciting learning experience! This event will be organized in a "speed dating" format. Everyone will have a chance to describe and react to the best practices in benefits communication and education. In this fast-paced, high-energy, non-competitive environment you will observe, listen, converse, question and reflect on what you and your colleagues have to share. Join in the fun!

• Retirement Benefits

Moderator: David G. Adams, Evangelical Lutheran Church in America

The pre-conference meeting will focus on issues of interest to all retirement plan sponsors, whether defined benefit or defined contribution. The following topics will be covered:

- Final 403(b) Regulations, led by *Danny Miller (Conner & Winters)*
- Financial Wellness in Retirement - What Church Retirement Plans are Doing to Help their Members Achieve Financial Security in Retirement, led by *Reverend Cathy Malotky (Evangelical Lutheran Church in America)*
- Collaboration Opportunities for Church Retirement Plans - Brainstorming Session, led by *Marlo J. Kauffman (Mennonite Church USA) and David G. Adams (Evangelical Lutheran Church in America)*

• Health Benefits

Moderator: Kim Walthall, Southern Baptist Convention

The pre-conference meeting serves as our primary annual meeting. Primary topics will include updates on health care purchasing coalition activities, updates on the health plan benchmarking initiative, and discussions on account based health plans such as Health Savings Accounts and Health Reimbursement Arrangements.

Breakout Session I Descriptions

• Retirement Benefits I - Defined Benefit Plans

Moderators: Pat Collier, The Church Pensions Fund and Lisa Schilling, The United Methodist Church

This break-out session will focus on issues of current interest to sponsors of defined benefit plans. The following topics will be covered:

- Income Replacement Objectives - How Much is Enough?, led by a *Representative from The United Methodist Church*
- United Methodists' Experience with New DB Plan, led by a *Representative from The United Methodist Church*
- Future of Cash Balance Plans, led by *James Kemper, Ice Miller*

• CEO

Moderator: Robert W. Maggs, Jr., CBA Board of Directors Vice-Chair, The Presbyterian Church (U.S.A.)

The CEO Topical Interest Group provides opportunity for discussion among CEO's (and Board of Trustee Representatives) on topics of mutual interest. Recent subjects have included compensation surveys, risk management, succession management, and business continuity, among others.

• Health Benefits

Moderator: Steve Gustavson, YMCA Retirement Fund

This break-out session will focus on current topics of general interest to health plan sponsors such as employee health and wellness programs.

• CFO

Moderator: Louis P. Barbarin, American Baptist Churches

This session will discuss financial topics that impact church pension boards and explore possibilities for collaboration.

2007 REGISTRATION BROCHURE

Breakout Session II Descriptions

• Retirement Benefits II - Defined Contribution Plans

Moderators: Karen DeRocker, American Baptist Churches Minister and Missionaries, and Marlo J. Kauffman, Mennonite Church USA

This break-out session will focus on issues of current interest to sponsors of defined contribution plans.

The following topics will be covered:

- Strategies to Discourage Roll-outs
- Roth TSAs - Pros and Cons for Church Plans (including planning tool demonstration), led by *James Kemper, Ice Miller*

• Legal

Moderator: Robert H. Rydland, Evangelical Lutheran Church in America

This session will examine legal topics affecting church benefits plans including housing allowance, state-mandated health benefits, UBIT and Alternative Investments, governance and other timely developments in the ever-changing legal arena.

• Investments

Moderator: David Zellner, The United Methodist Church

The session will be conducted as a roundtable discussion where participants will discuss various investment topics of interest to those involved in managing and administering investment programs to support retirement plans. Topics will include asset/liability management, legal matters affecting alternative investments, investment manager selection, alternative investments, participant fund options, and various other investments topics of interest to those attending the session.

• Communications

Moderators: Holly Vincent Bean, The Ministers and Missionaries Benefit Board, and Rolanda Johnson, The Salvation Army

Speaker: Lee Dukes, Matria Healthcare

Many church health plans are searching for ways to foster better individual health and responsibility while reducing health care costs. The objective is to increase productivity, decrease absenteeism, and improve the overall well-being and accountability of our plan members.

With wellness programs in development or in place, the real challenge becomes how to measure the success of these programs and what is the best way to gauge an employee's willingness to change. In keeping with the theme "To Serve Well, Be Well" this breakout session will feature Mr. Lee

Dukes, Senior Vice President of Wellness Solutions for Matria Healthcare. Mr. Dukes will speak on the topics of behavioral change in maintaining and sustaining one's health and wellness and how to use the Prochaska Model to measure individual changes that affect the whole membership.

Vendor Tables

Please make sure you stop by the Vendor Tables located near the CBA Registration Desk. Vendor tables will be open during the dates and times below:

Tuesday, November 27, 2007 8:00 am - 5:00 pm
Wednesday, November 28, 2007 8:00 am - 5:00 pm

Share and Inspire at the CBA Communications and Education Showcase

Tuesday, November 27, 2007 - Thursday, November 29, 2007

Leader: Jack E. Pfitzer, Concordia Plan Services

What do great communications look like? What has your group developed in the past year that communicated a message in clear expression and compelling design? Have your core communication vehicles been redesigned offering a good "before and after" story? Did you create an interesting solution to a perplexing communication challenge?

Share your organization's best at the *CBA Communications and Education Showcase* in Scottsdale this fall. Bring a few samples of your past year's work. Discover the communications other organizations have produced, and request free copies of the pieces that interest you. The Showcase will include these categories:

- Newsletters
- Annual reports
- Health and wellness materials
- Member education resources and tools
- Web site designs
- Media packaging i.e. CD/DVD covers and mailers
- New logos or brands

Label your materials by category and organization. If you have questions about the Showcase Center, please contact Shannon Fagan, 856-439-0500, ext. 4428, sfagan@ahint.com.

2007 Annual Meeting

To Serve Well...Be Well

Scottsdale, Arizona, November 27 - November 29, 2007

Hotel Accommodations

The CBA 2007 Annual Meeting is being held at:

The Scottsdale Plaza Resort
7200 N Scottsdale Rd
Scottsdale, AZ 85253
Phone: 480-948-5000
Fax: 480-951-5100
www.scottsdaleplaza.com



Warm and inviting, the Valley of the Sun beckons. Lush palms and golf greens grace the stunning backdrop of red desert rock. Turquoise pools sparkle within flower-adorned courtyards. And everywhere the sun rejuvenates. When you are ready to bask in the Valley's famous Southwest-style luxury, come experience The Scottsdale Plaza Resort.

The Scottsdale Plaza Resort is located about 14 miles from Phoenix Sky Harbor International Airport and 4 miles from the renowned shopping, spas and restaurants of Old Town Scottsdale. It is also minutes away from many shopping areas like the Fashion Square Mall and Camelview Plaza (5 minutes), Marshall Way and Main Street (6 minutes), Fifth Avenue Shops (10 minutes).

Hotel rooms are being held for the CBA 2007 Annual Meeting at a special rate of \$149 single/double occupancy (plus state and local taxes). Bellman gratuities of \$4 at arrival and \$4 at departure, along with \$2 per room night maid gratuity will be posted to each individual's guest folio. The deadline to make a hotel reservation is **Saturday, October 27, 2007**. Hotel reservations can be made two ways:

1. Online - www.churchbenefitsassociation.org
Click on "Hotel Information" listed on the left side of the web page
2. By Phone - (480) 948-5000 or (800) 832-2025
Reference "Church Benefits Association"

This discounted rate is only available when you make reservations directly through the Scottsdale Plaza Resort. There are a limited number of rooms guaranteed at this rate, so make your reservations as soon as possible.

Please note, after Saturday, October 27, 2007, hotel reservations will be taken on a room and rate availability basis

All reservations must be accompanied by a major credit card to guarantee the room reservation. Refunds are made only when cancellations are received 72 hours prior to scheduled arrival date. Cancellations must be made directly with the Scottsdale Plaza Resort. Hotel Check-in is 3:00 pm; Hotel Check-out is 12:00 noon.

Transportation Information

Driving Directions from Phoenix Sky Harbor International Airport:

Start out going EAST on East Sky Harbor Blvd. Turn slight LEFT to stay on East Sky Harbor Blvd. Take the AZ-202-LOOP EAST ramp toward Tempe. Merge onto AZ-202-LOOP EAST. Take EXIT 8 (McClintock Drive). Turn slight RIGHT onto North Hayden Road. Turn LEFT onto East Indian Bend Road. Turn RIGHT onto North Scottsdale Road. Make a U-TURN at East Hummingbird Lane onto North Scottsdale Road. Turn RIGHT to enter 7200 North Scottsdale Road.

Scottsdale Plaza Resort Shuttle Information:

Arrival

Upon arrival at the Sky Harbor airport, attendees may use the courtesy phone to arrange for shuttle service transportation to The Scottsdale Plaza Resort. A courtesy phone is located at the baggage claim area in each of the airport terminals. Dial the number labeled "The Scottsdale Plaza Resort" to be directly connected with the Transportation/Bell Desk dispatch at The Scottsdale Plaza Resort. If you are unable to locate the courtesy phone, please call 480-951-5118 to be directly connected.

Guests should retrieve their luggage prior to calling for shuttle service. Guests will be asked their name, the airline they arrived on, and the number in their party, as well as a brief clothing description (to allow the driver to recognize them). Guests will be directed to the north curb "Resort Shuttles/Courtesy Vehicle Loading" area (distinguished by a sign with a blue diamond), given a description of their van, an estimated time of pick-up, then will be driven directly to The Scottsdale Plaza Resort.

The shuttle departs the airport every half-hour, on the hour, from 6:00 am to 10:00 pm seven days a week. There is a charge of \$15 per person + 15 percent driver gratuity each way, which is posted directly to the individual's room account.

2007 REGISTRATION BROCHURE

Departure

Guests are asked to make arrangements for their departure by obtaining a shuttle voucher and scheduling a departure time at the Front Desk. The shuttle departs from the Main Lobby area during the same hours as mentioned above.

Super Shuttle

The Super Shuttle pickup at Sky Harbor is located on the outer island outside baggage claim. Look for the "VAN SERVICE" sign. The cost of traveling to the hotel on Super Shuttle is approximately \$20 per person. Super Shuttle requests that you give 24 hours notice for all pickups not at the airport. Contact Super Shuttle to get more information or to make reservations at (602) 244-9000/voice or (602) 243-7786/TDD, or www.supershuttle.com.

Off-site Dinner

The Heard Museum

2301 N. Central Avenue (Central and Encanto)
Phoenix, AZ 85004

Join fellow CBA Members at the 2007 Annual Meeting "Kick Off" dinner reception at The Heard Museum. Since its founding by Dwight and Marie Heard in 1929, the Heard Museum has grown in size and stature, to where it is now recognized internationally for the quality of its collections, its educational programming and its festivals. Today, the Heard Museum of Native Cultures and Art is a must-see Arizona landmark - a place of learning, discovery and an opportunity to share Native traditions that will touch your heart.

Golf Outing

McCormick Ranch Golf Club

7505 E. McCormick Parkway
Scottsdale, AZ, 85258
(480) 948-0260

Separate Registration Fee - See Registration Form

7:00 am - 12:00 nn - Continental Breakfast starting at 6:30 am

More than just a golf course... The McCormick Ranch Golf Club offers any caliber of player two spectacular resort golf courses, which are open to the public 365 days a year. These lush, well-manicured, traditional layouts are located amidst gorgeous scenery in the heart of Scottsdale. Meet the challenge of these fine courses, known for hosting the Arizona Amateur Stroke Play Championship, the Golf for Women National Club Championship, the Arizona Open Professional Golf Tournament, and the National Junior College Golf Championship. The ninth hole of the Palm Course was chosen by *Golf Illustrated* as "One of the USA's top 18 water holes."

The registration fee is \$135 per golfer. This fee includes your green fees, cart fees, sleeve of balls, breakfast, lunch, and round trip transportation. Buses will depart from the Scottsdale Plaza between 6:15 - 6:30 am.

Rental of golf clubs is available for an additional \$45 per player, payable on-site.



CBA Board of Directors

Barbara A. Boigegrain, *Chair*
The United Methodist Church

Robert W. Maggs, Jr. *Vice-Chair*
The Presbyterian Church (U.S.A.)

Sarah Hirsén, *Secretary*
The United Methodist Church

Frank Maloney, *Treasurer*
The Presbyterian Church (U.S.A.)

K. Young Bae
Association of Unity Churches

O.S. Hawkins
Southern Baptist Convention

Jeffrey A. Jenness
Board of Pensions of the
Church of God

Del L. Johnson
General Conference of Seventh-day
Adventist Church

John G. Kapanke
Evangelical Lutheran Church in
America

Robert M. Koppel
Jewish Reform Movement

John M. Preis
YMCA Retirement Fund

Arthur D. Rhodes
Church of God Benefits Board

Inge Schroeder
Lutheran Church - Canada

T. Dennis Sullivan
Episcopal Church



Pre-Registration Deadline: Friday, November 2, 2007

2007 Annual Meeting

To Serve Well...Be Well

Scottsdale, Arizona, November 27 - November 29, 2007

CBA Program Planning Committee

Michael A. Downs, *Chair*
United Church of Christ

William L. Walz, *Vice-Chair*
Christian Brothers Services

O.S. Hawkins
Southern Baptist Convention

Barbara A. Boigegrain, *Ex-officio*
The United Methodist Church

Jon M. Flanagan
Wisconsin Evangelical Lutheran Synod

Paul W. Middeke
Lutheran Church-Missouri Synod

John G. Kapanke, *Ex-officio*
Evangelical Lutheran Church in
America

James P. Hamlett
Christian Church (Disciples of Christ)

CBA Headquarters and Staff

Church Benefits Association
15000 Commerce Parkway • Suite C
Mt. Laurel, NJ 08054
Phone: 856-439-0500
Fax: 856-439-0525
E-mail: cba@ahint.com
www.churchbenefitsassociation.org

Executive Director
Amy Williams, CAE
awilliams@ahint.com

Meeting Manager
Shannon Fagan
sfagan@ahint.com

Assistant Meeting Manager
Kristin Howard
khoward@ahint.com

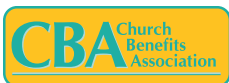
Assistant Executive Director
Melissa Baldwin
mbaldwin@ahint.com

Administrative Assistant
Deanna Bright
dbright@ahint.com

Registration Coordinator
Annalee Nelson
anelson@ahint.com

Save the Date

2008 CBA Annual Meeting
December 2 - 4, 2008
The Naples Beach Hotel and Golf Club
851 Gulf Shore Boulevard North
Naples, Florida 34102



15000 Commerce Parkway • Suite C
Mt. Laurel, NJ • 08054