

CHURCH PLAN WORKSHOP 2007

MONDAY, APRIL 16 – WEDNESDAY, APRIL 18, 2007
THE SCOTTSDALE PLAZA RESORT
SCOTTSDALE, ARIZONA

Sponsored by



CONNER & WINTERS, LLP



1627 I Street, N.W.
Suite 900
Washington, DC 20006

Church Plan Workshop 2007 is designed for individuals who serve church pension boards and church-related organizations. The topics covered will include a detailed discussion of the administration of a church 403(b)(9) retirement income account program and presentations on other issues of interest to church retirement plan and welfare plan administrators.

**CHURCH PLAN WORKSHOP 2007
APRIL 16 – 18, 2007
SCOTTSDALE, ARIZONA**

MONDAY, APRIL 16, 2007

7:00 a.m. - 8:00 a.m. *Continental Breakfast
Registration*

8:00 a.m. - 8:15 a.m. Welcome and Workshop
Announcements

8:15 a.m. - 10:00 a.m. 403(b) Basics

10:00 a.m. - 10:15 a.m. *Morning Break*

10:15 a.m. - 12:00 p.m. 403(b) Basics (Cont'd)

12:00 p.m. - 1:00 p.m. *Lunch Break*

1:00 p.m. - 2:30 p.m. 403(b) Basics (Cont'd)

2:30 p.m. - 3:00 p.m. *Afternoon Break*

3:00 p.m. - 4:00 p.m. Roth Contributions: Case Studies

4:00 p.m. - 5:00 p.m. Legal Ethics Discussion

6:00 p.m. Fellowship Reception

10:15 a.m. - 12:30 p.m.

Benefits Roundtable Discussion
(Cont'd)

- Health Care Update: HSAs, Wellness Programs and Employee Incentives
- Miscellaneous Benefit Plan Topics

12:30 p.m.

Adjourn for the day

WEDNESDAY, APRIL 18, 2007

TUESDAY, APRIL 17, 2007

7:00 a.m. - 8:00 a.m. *Continental Breakfast*

8:00 a.m. - 10:00 a.m. Benefits Plan Roundtable
Discussion

- Retirement Plan Compliance Issues (Panel Discussion)
- Housing Allowance and Other Issues for Clergy Serving "Outside the Pulpit"

10:00 a.m. - 10:15 a.m. *Morning Break*

10:00 a.m. - 10:15 a.m.

Morning Break

10:15 a.m. - 12:30 p.m.

Benefits Roundtable Discussion
(Cont'd)

- Foreign Missionaries and Foreign Nationals: Retirement Plan Issues
- Mutual Fund Fees and Expenses – Church Plan Concerns?

12:30 p.m.

Conclusion of Workshop

SITE AND MEETING INFORMATION

The Scottsdale Plaza Resort
7200 North Scottsdale Road at Indian Bend
Scottsdale, Arizona 85253
Telephone (480) 948-5000
Fax (480) 998-5971

Location:

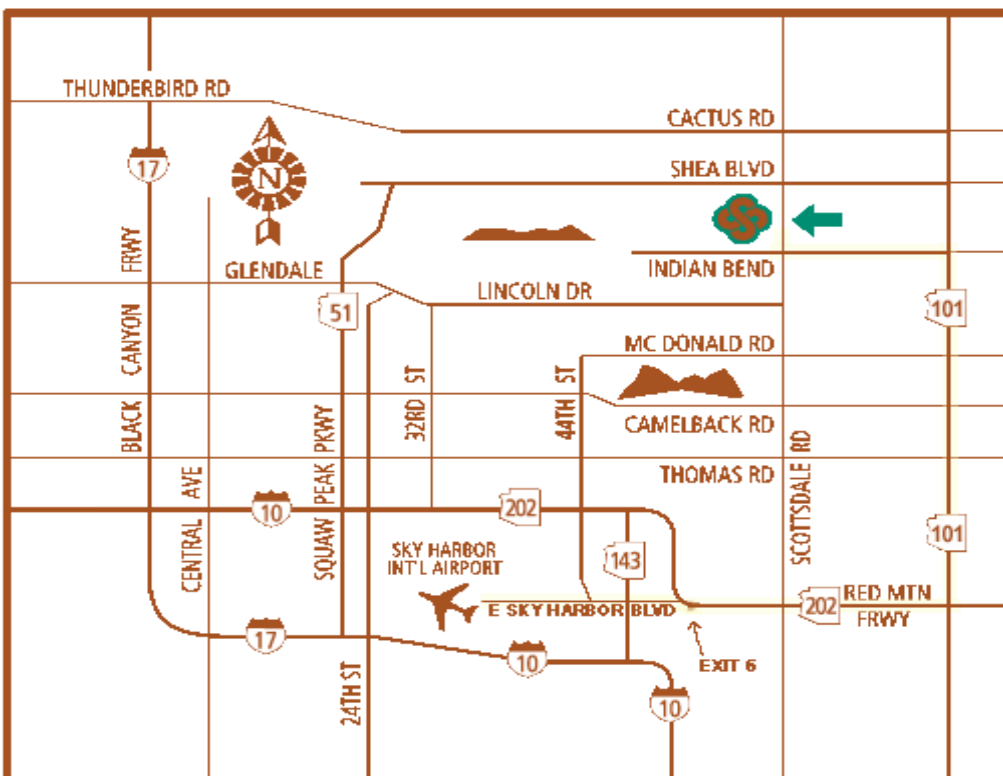
The Scottsdale Plaza Resort is located about 14 miles from Phoenix Sky Harbor International Airport and 4 miles from the renowned shopping, spas and restaurants of Old Town Scottsdale. It is also minutes away from many shopping areas like the Fashion Square Mall and Camelview Plaza (5 minutes), Marshall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

Hotel Accommodations:

The Scottsdale Plaza Resort is located on 40 beautifully landscaped acres in the shadow of famed Camelback Mountain. All guests of the resort will have access to the five swimming pools, lighted tennis courts, fitness center with maxim and precor equipment, and Arizona's largest whirlpool spa

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 a.m. to 10:00 p.m. seven days a week. There is a charge of \$15.00 per person + 15% driver gratuity each way, which is posted directly to the individual's room account.

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 \$20.00 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.

Downtown "Scottsdale Trolley":

The city of Scottsdale offers a free trolley with service from the Scottsdale Plaza Resort to the Scottsdale Fashion Square, Fifth Avenue Shops, Marshall Way Arts District, Main Street Arts District, Old Town, and the Scottsdale Convention & Visitors' Bureau. Service will operate from approximately 10 a.m. - 7:15 p.m. six days per week (Monday - Saturday). Service is extended on Thursday nights to deliver customers to and from the Scottsdale Art Walk. For more information, please visit the concierge at the hotel or www.scottsdaletrolley.com

Guest Room Rates:

CBA & Conner & Winters have reserved a number of guest rooms for Sunday, April 15th through Wednesday, April 18th, 2007, at the rate of \$185.00/night. Bellman gratuities of \$4.00 at arrival and \$4.00 at departure, along with \$2.00 per room night maid gratuity will be posted to each individual's guest folio.

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

This special rate will be offered 2 days prior to the start of the Workshop and 2 days after the end of the Workshop, based on hotel availability. All reservations must be made through the Scottsdale Plaza Resort ***no later than Friday, March 23, 2007***. After that date, guest room cost and availability will be determined by the Scottsdale Plaza Resort. Reservations for the Workshop can be made by dialing **(800) 832 – 2025**. Attendees must reference "**2007 Church Plan Workshop**", in order to get the contracted rate of \$185.00/night.

Church Plan Workshop 2007 REGISTRATION FORM

Registration Information:

To register for Church Plan Workshop 2007, fill out the registration form **in full** and return it, along with payment of the registration fee to the address below

**Church Benefits Association
c/o Annalee Nelson, CBA Registration Coordinator
15000 Commerce Parkway, Suite C
Mt. Laurel, NJ 08054**

*Please make checks payable to **Church Benefits Association**.

Registration can also be made via fax, attn: Annalee Nelson, CBA Registration Coordinator, fax # 856-439-0525.

Registration Fee:

The registration fee for the 2007 Workshop is **\$225.00 for Church Benefits Association (CBA) members and \$300 for non-CBA members**. This payment covers attendance at Workshop sessions, program materials, CLE registration (for those desiring CLE credit), a daily continental breakfast, snack breaks on each day of the Workshop, and a reception.

Deadlines:

The registration form and payment must be submitted no later than **March 23, 2007**. Please submit your registration form and payment as soon as possible.

CLE Credit:

CBA will submit an application for CLE credit only to those states indicated by the attendees on their registration form. To ensure that an application for CLE credit is submitted to your state bar association, please complete the CLE section of the registration form.

If you are eligible to claim CLE credit for attending, please remember that early registration will help ensure that you will receive credit from your state bar association. Many state bar associations require submission of applications for credit by sponsors prior to the actual conference.

Questions:

If you have any questions or would like any additional information on Church Plan Workshop 2007, please contact Shannon Fagan, CBA Meeting Manager, (856) 439-0500, ext. 4428.

Name of Attendee: _____

Name of Organization: _____

Address: _____

City: _____

State/Zip: _____

Telephone/Fax: _____

Email: _____

State for CLE Application if Applicable: _____

Are you a CBA member? Yes No

Total Amount Due: _____

Check Enclosed: Yes No

Are you interested in golf? If yes, please check below *(Details on golf arrangements to follow):*

Tuesday Wednesday Both

Please list any particular topics that you would like covered in the Workshop:

*For Group Registration, please contact Annalee Nelson, CBA Registration Coordinator, anelson@ahint.com