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## Operating in Compliance

Understanding IRS and DOL Audit Hot-Button Issues

How Plan Sponsors Can Address Them

HR professionals who manage benefit programs for their organizations have the fiduciary responsibility to make sure the programs are fair and in compliance with relevant laws. This presentation will discuss IRS, DOL audit “hot buttons,” and walk through some actual as well as hypothetical case studies. You will learn the common errors plan administrators typically make, and know how to mitigate or correct those mistakes. The presentation will also cover best practices in benefit administration and provide checklists to help you manage your fiduciary responsibilities.

**Learning Objectives:** Upon completion of the session, you will be able to:

- Identify IRS and DOL “hot buttons”
- Identify common plan administration errors and how to mitigate/correct those mistakes
- Apply the checklist to manage fiduciary responsibilities

### About the Panelists:

Thomas Loncar, CRPS®, AIF®, VP and Senior Retirement Consultant of OppenheimerFunds.

Loncar has 22 years of experience in the corporate retirement plan marketplace. He has presented at both local and national SHRM events, sharing insights on topical trends for plan sponsors. He helps fiduciaries find innovative solutions to retirement plan challenges in the ever increasingly complex employee benefit space, sharing expert technical knowledge and translating ideas into practical, actionable strategies.

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Thank you to our meeting sponsor:



**May 10, 2018**

8:00 a.m. Networking and Breakfast  
9:00 – 10:00 a.m. Program

**Jumping Brook Country Club**  
210 Jumping Brook Road, Neptune N.J.  
([www.jumpingbrookcc.com](http://www.jumpingbrookcc.com))

**R.S.V.P. by 4:00 p.m. on Friday, May 4, 2018**

online at <http://jsahr.shrm.org/events>  
or email at [admin@jsahr.org](mailto:admin@jsahr.org)  
or call JSAHR at 732-701-7155

**Registration Fees (includes breakfast)**  
\$30 for JSAHR members  
\$40 for non-members  
\$25 for those in-transition and guests  
\$10 for students with valid ID  
\$10 additional fee for walk-ins  
**“No shows” will be billed**

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