“HDHPs and HSAs – It’s what’s in the details that count”
Co-sponsored by the Employee Benefits Institute of Kansas City

Wednesday, January 22, 2014 • 7:30 - 9:50 AM
KCMBIA Conference Center
Credit:  Missouri – 2.0 / Kansas – 2.0
Cost:  $25 Member and Non-Member

DESCRIPTION

Jenny Housley will discuss how to integrate consumer driven plans with tax advantaged savings accounts. This integration requires consideration of a long-term strategy that fits the needs of your workforce while also hitting corporate objectives. Hear why employers believe QHDHPs are here to stay and learn best practices of a successful implementation of these plans. Jenny will share a case study of a full replacement QHDHP/HSA and the outcomes one large employer is seeing several years into this strategy.

Cris Ruiz will speak to the practical application of HSA accounts – eligibility (dependents), administration, recordkeeping, taxation, coordination with Medicare, compliance, and the importance of selecting an HSA custodian that understands your needs.

SCHEDULE

7:30 AM  Registration
8:00 AM  Seminar (includes a 10-minute break)
9:50 AM  Adjourn

SPEAKERS:  JENNY HOUSLEY, LOCKTON COMPANIES
CRIS RUIZ, VICE PRESIDENT, UMB BANK, N.A.

*Course materials will be provided in electronic format only and are accessible with your laptop, tablet or other mobile device during the event. Final course materials will be posted prior to the event at www.kccle.org. Go to the calendar, select the event and click on the Materials tab. Parking will be validated at the event.

**On-site registrations are welcome; however, seating and/or meals cannot be guaranteed unless you pre-register.

Upcoming EBI events
February 12, 2014 – Risks & Strategies on Offering Employer Stock in a Retirement Plan
March 6, 2014 – How to Breeze Through Your Employee Benefit Plan Audits

KCMBIA CONFERENCE CENTER
TWO PERSHING SQUARE
2300 MAIN ST., SUITE 100
KANSAS CITY, MO 64108
(816) 474-4322

4 WAYS TO PRE-REGISTER:
1. Online at www.KCCLE.org
2. Mail completed registration form with payment to KCMBIA UMKC CLE, Two Pershing Sq., 2300 Main St., Suite 100, Kansas City, MO 64108.
3. Phone (816) 474-4322
4. Fax (816) 474-0103

Parking is available at Two Pershing Square via OK Street, off Grand Blvd on level P3. Visit kcmba.org/parking for directions and a map. Parking will be validated at the event.

Event cancellations received 48 hours or more prior to the start of an event may receive a cash refund minus a $25 processing fee, or a credit voucher in the full amount of fees paid which will be valid for one year from the date of the event.

Substitutions for paid registrations are accepted. Credit vouchers are transferable.

No shows will not receive a refund or credit voucher. No shows requesting refunds due to emergency or hardship must be received in writing no more than 30 days after the event date.

Special accommodations can be made by contacting KCMBIA UMKC CLE at (816) 474-4322 prior to the program date.

KCCLE.org

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