

**JOIN YOUR FELLOW TPA BUSINESS OWNERS AT THE 2019BMC**

*AND EXPERIENCE A REFOCUSSED APPROACH TO TPA FUNDAMENTALS*



**BMC**

**2019 BUSINESS  
MANAGEMENT  
CONFERENCE**

**JANUARY 12-14, 2019**

**SCOTTSDALE, AZ • SANCTUARY  
ON CAMELBACK MOUNTAIN**





## IT'S THE TOP TPA BUSINESS OWNER EVENT OF THE YEAR, WITH A WHOLE NEW APPROACH.

The BMC is an exclusive gathering of successful entrepreneurs in our industry. In its same great location, the 2019BMC is taking a renewed focus on the needs of the TPA business owner – all so you can increase productivity, save time, and make more money.

### HERE'S WHAT YOU CAN EXPECT:



Practical tools for elevating your day-to-day efficiencies



Key insights from industry professionals and your peers



Topics that address your unique needs and challenges



Educational opportunities to earn up to 12 NIPA CPE credits

### FIRST STEP: REGISTER.

Visit [www.nipa.org/BMC](http://www.nipa.org/BMC) to register on or before December 14, 2018 to receive \$100 off the regular registration rate.

*Registration for the NIPA Business Management Conference is limited to owners and senior executives of TPA firms – defined as any firm that does business through record keepers and/or advisors. If a firm markets or sells part, or all, of its services to TPAs, it is not considered a TPA but a provider for the purposes of attending the BMC.*

### THEN, SECURE YOUR ROOM AT THE SANCTUARY AT CAMELBACK MOUNTAIN.

Once you've registered for the BMC, secure the exclusive hotel room rate of \$370 by December 5, 2018 at the Sanctuary on Camelback Mountain in Scottsdale, Arizona.

Head to [www.nipa.org/BMCHotel](http://www.nipa.org/BMCHotel) to book your room.

### NEW TO THE BMC?

If you have never been to the BMC or haven't attended in the last three years, you can register for more than 50% off the regular registration rate.



## TAKE A LOOK AT THE AGENDA.

For the latest BMC session information, visit [www.nipa.org/BMC](http://www.nipa.org/BMC).

*Schedule subject to change. Business casual attire is encouraged for all events.*

### SATURDAY, JANUARY 12

11:00 a.m. – 12:45 p.m.

#### Registration

12:45 p.m. – 1:00 p.m.

#### Opening Comments

1:00 p.m. – 2:30 p.m.

#### Ethical Leadership

*Corey Ciocchetti, Associate Professor of Business Ethics and Legal Studies, Daniels College of Business at the University of Denver*

2:30 p.m. – 2:45 p.m.

#### Break

2:45 p.m. – 4:15 p.m.

#### Cyber Security

*Paul Perry, CISM, CITP, CPA, FHFMA, Member, Risk and Controls Practice Leader, Warren Averett*

4:15 p.m. – 4:30 p.m.

#### Break

4:30 p.m. – 6:00 p.m.

#### Peer Interaction Session #1

6:30 p.m. – 9:30 p.m.

#### Reception Dinner\*

### SUNDAY, JANUARY 13

8:00 a.m. – 8:30 a.m.

#### Continental Breakfast\*

8:30 a.m. – 10:00 a.m.

#### Creating the Consultant Culture

*Michelle Golden River, CPF, President, Fore LLC*

10:00 a.m. – 10:15 a.m.

#### Break

10:15 a.m. – 11:45 a.m.

#### Peer Interaction Session #2

11:45 p.m. – 12:45 p.m.

#### Lunch

12:45 p.m. – 2:45 p.m.

#### TPA Panel Discussion

*Facilitated by Claudia St. John, SPHR, SHRM-SCP, President, Affinity HR Group, LLC*

2:45 p.m. – 3:00 p.m.

#### Break

3:00 p.m. – 4:30 p.m.

#### Letting Go With Grace: Delegation Isn't Easy

*Michelle Golden River, CPF, President, Fore LLC*

6:30 p.m. – 10:00 p.m.

#### Reception Dinner\*

### MONDAY, JANUARY 14

7:30 a.m. – 8:00 a.m.

#### Continental Breakfast\*

8:00 a.m. – 9:30 a.m.

#### My Name Is Alison Cohen and I Fix Broken Plans

*Alison Cohen, CPC, J.D., Partner, Ferenczy Benefits Law Center*

9:30 a.m. – 9:45 a.m.

#### Break

9:45 a.m. – 11:00 a.m.

#### Peer Interaction Session #3

11:00 a.m. – 11:15 a.m.

#### Break

11:15 a.m. – 12:30 p.m.

#### Employment Law – Top 10 Mistakes

*Nonnie Shivers, Attorney at Law at Ogletree, Deakins, Nash Smoak & Stewart*

12:30 p.m. – 1:00 p.m.

#### State of Employment

*Claudia St. John, SPHR, SHRM-SCP, President of Affinity HR Group, LLC*

1:00 p.m.

#### 2019BMC Closing Comments and Box Lunch

*\*Available to attendees and registered guests only*

*“Attending the BMC was an amazing way to begin the business year. It gave me the opportunity to talk to many of my peers across the country and provided me with many new ideas to improve several aspects of my company.”*

*Jim B. Eberhardt, APA, President, Imprimis Financial & Insurance Services, Inc.*



## GENERAL SESSIONS FIT FOR YOUR UNIQUE NEEDS.



### Ethical Leadership

*Corey Ciocchetti, Associate Professor of Business Ethics and Legal Studies, Daniels College of Business at the University of Denver*

Corey's most popular keynote on ethics encourages audiences to chase the truly important things in life such as a solid character, strong personal relationships and a sense of contentment. These "real rabbits" are compared and contrasted to more fleeting worldly success such as excessive wealth, popularity, and prestige. Audience members leave with a better sense of what it takes to make ethical decisions, develop integrity, set priorities, gain a big-picture perspective, and chase an authentic life. By the end, Corey promises that this will be one of the most powerful and motivational speeches you have ever heard.



### Cyber Security

*Paul Perry, CISM, CITP, CPA, FHFMA, Member, Risk and Controls Practice Leader, Warren Averett*

Paul will explore how business owners can help prepare and train staff to protect the company, their customers and themselves against cyber security threats and fraud. We will discuss items from proper tone at the top of the organization to security awareness training and risk assessments to help companies prepare and mitigate their risk against these threats.



### Creating the Consultant Culture

*Michelle Golden River, CPF, President, Fore LLC*

As professional-service firms' core services face increasing commoditization in today's competitive landscape, wise businesses pursue differentiation in a variety of ways. Whether it's through offering ancillary services, solving deeper problems, or enriching your value proposition through strategic partnerships, a consultative mindset is often at the core of strategic growth and distinction. But what exactly is the mindset of the consultant compared to other service providers? What makes a consultant effective? And how do we shift our teams to be more consultative? This interactive session begins with exploring the tenets of the consultative mindset and then working together to apply the concepts in our pension administration space.



### Letting Go With Grace: Delegation Isn't Easy

*Michelle Golden River, CPF, President, Fore LLC*

Delegating sounds easy, so why is it so difficult? The ability of a business to grow is directly proportionate to its effectiveness at leveraging people and delegating work to others. Many of us—perhaps because we've been "burned" before—are cautious. We're wary of errors or shortcomings when we invite others into our client relationships and tasks. It's not just you. Many managers

and C-suite execs are plagued with an inability to truly "let go." Entrusting others with responsibility as well as authority are huge emotional challenges that can actually involve humans' "fight or flight" instincts. How do we overcome this and get the most out of our people, truly empowering them to grow? How do we shape up-and-comers with the skills to advance the business? How can we get past control needs and let go of certain work and certain business relationships?



### My Name Is Alison Cohen and I Fix Broken Plans

*Alison Cohen, CPC, J.D., Partner, Ferenczy Benefits Law Center*

Broken plans are a part of our life. As third-party administrators, we cannot control what occurs at the Plan Sponsor's office. We can educate, remind, support, and provide many tools for the Plan Sponsor, but we can't make them use any of it. What can we control? Our own administration and operations. Nothing is more frustrating to a TPA owner than to find out that their own team caused the failure. We will talk about the types of failures that occur 'in-house' and how they can be avoided. We will also talk about what steps to take when failures are discovered to minimize your financial liability and protect your relationship.



### Employment Law – Top 10 Mistakes

*Nonnie Shivers, Attorney at Law at Ogletree, Deakins, Nash Smoak & Stewart*

While we don't delight in other employer's misfortune, those schadenfreude moments involving employer and employee missteps allow us to learn from the mistakes and teachable moments experienced by other employers. This session will identify and explore the top 10 mistakes made by employers, including failing to document performance issues and failing to stay up-to-date on local and state law developments (such as new paid sick leave laws and harassment policy/training requirements) and the solutions with each of the 10 mistakes to keep your legal spend under control by being proactive.



### State of Employment

*Claudia St. John, SPHR, SHRM-SCP, President of Affinity HR Group, LLC*

As we launch a new year and prepare for 2019, knowing the likely employment trends is critical to helping businesses plan for the future. This session presents the most recent employment trends and looks forward to predict the challenges and opportunities presented to businesses in 2019 such as the likely pressure on wage growth, trends in recruiting and retaining employees, and anticipated legislative and regulatory initiatives at the federal, state and local levels and how to respond to them. This session, presented by Claudia St. John, is designed to be informative and brief – just enough to get your thoughts flowing on how to prepare for the new year ahead!



## PEER INTERACTION SESSIONS THAT SHARE SUCCESSES AND BEST PRACTICES.

With small groups of 10-15 owners and executives, these informal targeted sessions allow you to share first-person accounts of professional success stories and best practices and discuss tips for understanding and managing challenges faced throughout the industry.

### BEST PRACTICES FOR TPA (CLIENT RELATED)

This session will be a great opportunity to work with peers on some of the most critical aspects of your client management processes. Discuss what to include in your service agreements, how to prepare a fully documented business plan and how to track key performance indicators. Share best practices for charging client administration fees and how often you increase the TPA administration fees.

### CYBER SECURITY

This session is intended to share real experiences with cyber education, attacks, and establishing standards of operation. Discussion will include the importance of training your staff to serve as your firewall, educating staff on the importance of protecting all personal information, and sharing real work experience with targeted attacks. Attend and share your questions, experiences, and best practices.

### EMPLOYMENT BEST PRACTICES

With constant changes in the retirement space, when was the last time you took a moment to review your employment practices? Let's be honest, employment practices take a back seat to other concerns like staying up to date on ERISA or focusing on growth and day to day tasks. At this session, we will share the best practices in all aspects regarding your employees. We will spend time focusing on concerns in the hiring process and the most successful ways to find the right employees; discuss how you and your managers address employee concerns. We will also look at the best way to handle employee terminations. Leave this session with new knowledge and understanding the best practices that can immediately be implemented into your business.

### MARKETING & SALES

This session is a BMC classic! Discuss your organization's marketing and sales strategies, including tips for growing your company's revenue with simple, powerful, low and no-cost marketing techniques. Share how you receive sales support from strategic partners, sales employees' experiences, sales compensation plans and how you generate leads. Find out what is working for other TPAs and how you can increase your sales.

*"Attending the BMC for the first time, I returned to my team with more ideas and engaged them for the first time in months. I will continue to apply these ideas and collaborate with my team throughout the year."*

Tracie Shamp, PACETPA

### PRACTICE MANAGEMENT (NON-CLIENT RELATED)

We all know the challenges of working ON our business versus working IN our business, yet we can all agree this is an important leadership role. This is a great opportunity to collaborate with your peers on growth opportunities for your firm and for your employees. What services have you decided to add or discontinue, and why? What new tools or processes do you need to add or change? Let's spend some focused time working ON your business, and collaborate on best practices. Find out what others are doing that bring value and efficiency to their practice, and come away with tips you can put to use immediately.

### SUCCESSION PLANNING

Share your business goals with industry professionals and seek input from your peers on the benefits of selling your business to an outside entity or to your employees. Discuss the legal/technical assistance you engage in to help in succession planning, timing of your goals and what your next steps should be once your business is sold. Talk with your peers and discuss metrics used in valuing your business and how others have performed the valuation.

### GENERAL SESSION: TPA PANEL DISCUSSION

*Facilitated by Claudia St. John, SPHR, SHRM-SCP, President, Affinity HR Group, LLC*

Our skillful and engaging moderator will prompt discussion by a small panel of your peers, who will share their best practices within their respective firms. These experienced and successful TPA panelists represent different parts of the country, each with a different focus. This 90 minute session will allow you to hear their successes, concerns, and challenges. There will be time to ask questions, share your thoughts, and stimulate conversation amongst your peers.

## SPONSORS

THANK YOU TO THE FOLLOWING 2019BMC SPONSORS.



## MAJOR SPONSORS

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## CONTRIBUTING SPONSORS

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*\*As of October 30, 2018.*

**REGISTER BY DECEMBER 14, 2018 TO SAVE \$100!**