

Stamer Presents “Health Care Reform 2015 Survival Bootcamp” At October 1, 2015 Dallas Estate Planning Council Luncheon

Stamer | Chadwick | Soefje PLLC attorney *Cynthia Marcotte Stamer* will present a “Health Care Reform 2015 Survival Bootcamp” to the Dallas Estate Planning Council October 1, 2015 Noon luncheon meeting at Brookhaven Country Club located at 3333 Golfing Green Drive, Farmers Branch, TX 75234.

With already high health benefit costs rising again, many employers now also face “pay-or-play” penalties if they don’t offer the “right” health coverage required by ACA, while most employers sponsoring group health plans now also face Sarbanes-Oxley style self-reporting and \$100 per violation per day excise penalties for any period after 2013 that their health plan fails to meet a long list of federal mandates. With these and other new ACA mandates and penalties adding to the already long-standing and significant liability exposures to unanticipated and often uninsured added benefit and other plan funding costs, costs of defense of government and private investigations, settlements, and judgements arising benefit, fiduciary breach, and other claims against the company or its management, the plan, its fiduciaries or vendors, it is imperative that U.S. employers, their management, and their health plan fiduciaries, insurers, service providers and consultants take immediate steps to ensure their health plan complies with this ever-evolving maze of federal health plan eligibility and benefit, wellness and disease management, claims and appeals processing, privacy, notice and reporting and other federal requirements for the upcoming 2016 as well as during 2014 and 2015.

To help health plan sponsors, fiduciaries, administrators and insurers, and the brokers, consultants, estate planners, and other advisors working to assist employers and individuals to understand and deal with this challenging task, Ms. Stamer will explain key federal health plan rules that employers and others working to manage these health plan concerns and share practical strategies to help employers, health plan fiduciaries and administrators, and their advisors cope with health care reform now and to prepare to meet current and future health plan regulations and challenges. During her presentation, participants will learn:

- The latest updates on the individual and employer “pay-or-play mandates”
- A 13-Step Practical Process For Helping Employers Manage ACA & Other Health Plan Compliance Responsibilities & Risks
- Updates On Key ACA & Other Health Plan Rules
- The Health Plan Violations That Can Trigger The New \$100 Per Violation Per Day Employer Excise Tax & Sarbanes-Oxley Style Self-Reporting Obligations of ACA;
- Other Key Health Plan Rules Targeted For Audit Or Enforcement By The IRS, DOL & HHS
- Potential Opportunities & Pitfalls From Using “Skinny Plans,” “Employer Payment Plans,” “Private Exchanges and Other Selected Special Plan Designs
- Special Wellness & Disease Management Rules & Risks In Light Of The Latest EEOC, DOL, IRS & HHS Regulations & Enforcement Positions; Fiduciary Liability Key Changes To HIPAA & GINA Privacy Regulations & How Employers, Health Plans & Their Management & Vendors Should Respond and
- Vendor Selection & Contracting, Plan Documentation & Communication, Procedural & Other Tips To Help Manage & Mitigate Legal & Operational Risks.

To register or for additional information about the Dallas Estate Planning Council or its October 1, 2015 meeting, see the [Dallas Estate Planning Council Website](http://www.dallasestateplanningcouncil.com).

Stamer Known For Pragmatic Health Benefit Advice & Thought Leadership

A Fellow in the American College of Employee Benefits Counsel and recognized by DMagazine as among the “*Best Lawyers In Dallas*” for her work in the field of “Tax: Erisa & Employee Benefits” and the “*Top Rated Labor & Employment Lawyers in Texas*” in the 2014 LexisNexis® Martindale-Hubbell® list of Top Rated Lawyers, Ms. Stamer is a noted Texas-based management lawyer and consultant, author, lecturer and policy advocate, particularly recognized for her leading edge work, thought leadership and knowledgeable advice and representation on the design, documentation, administration, regulation and defense of a diverse range of self-insured and insured health and welfare benefit plans, policies, practices, technologies and processes including private exchange and other health benefit choices, health care reimbursement and other “defined contribution” limited benefit, 24-hour and other occupational and non-occupational injury and accident, ex-patriate and medical tourism, onsite medical, wellness and other medical plans and insurance benefit programs as well as a diverse range of other qualified and nonqualified retirement and deferred compensation, severance and other employee benefits and compensation, insurance and savings plans, programs, products, services and activities.

Nationally and internationally sought out for her deep and pragmatic knowledge and more than 28 years of experience in helping employers and other employee benefit plan sponsors; health, pension and other employee benefit plans, their fiduciaries, administrators and service providers, insurers, and others design legally compliant, effective compensation, health and other welfare benefit and insurance, severance, pension and deferred compensation, private exchanges, cafeteria plan and other employee benefit, fringe benefit, salary and hourly compensation, bonus and other incentive compensation, insurance and risk management programs, products and arrangements, Ms. Stamer works closely with employer and other plan sponsors, insurance and financial services companies, plan fiduciaries, administrators, and vendors and others to design, administer and defend effective legally defensible employee benefits and compensation practices, programs, products and technology. She also continuously helps employers, insurers, administrative and other service providers, their officers, directors and others to manage fiduciary and other risks of sponsorship or involvement with these and other benefit and compensation arrangements and to defend and mitigate liability and other risks from benefit and liability claims including fiduciary, benefit and other claims, audits, and litigation brought by the Labor Department, IRS, HHS, participants and beneficiaries, service providers, and others. She also assists debtors, creditors, bankruptcy trustees and others assess, manage and resolve labor and employment, employee benefits and insurance, payroll and other compensation related concerns arising from reductions in force or other terminations, mergers, acquisitions, bankruptcies and other business transactions including extensive experience with multiple, high-profile large scale bankruptcies resulting in ERISA, tax, corporate and securities and other litigation or enforcement actions.

As a continuous part of her work, Ms. Stamer also has been and remains deeply involved in helping to influence the Affordable Care Act and other health care, pension, social security, workforce, insurance and other policies critical to the workforce, benefits, and compensation practices and other key aspects of a broad range of businesses and their operations. She both helps her clients respond to and resolve emerging regulations and laws, government investigations and enforcement actions and helps them shape the rules through dealings with Congress and other legislatures, regulators and government officials domestically and internationally. A former lead consultant to the Government of Bolivia on its Social Security reform law and most recognized for her leadership on U.S. health and pension, wage and hour, tax, education and immigration policy reform, Ms. Stamer works with U.S. and foreign businesses, governments, trade associations, and others on workforce, social security and severance, health care, immigration, privacy and data security, tax, ethics and other laws and regulations. Founder and Executive Director of the Coalition for Responsible Healthcare Policy and its PROJECT COPE: the Coalition on Patient Empowerment and a Fellow in the American Bar Foundation and State Bar of Texas, Ms. Stamer annually leads the Joint Committee on Employee Benefits (JCEB) HHS Office of Civil Rights agency meeting and other JCEB agency meetings. She also works as a policy advisor and advocate to many business, professional and civic organizations. Involved in health and workforce policy advocacy leadership throughout her adult life, Ms. Stamer’s work as the founder and executive director of the Coalition and its PROJECT COPE drew local and national attention in August 2009 when she lead the planning and hosted the Charting America’s Health Care Future Healthcare Forum the height of the health policy debates preceding the 2009 Congressional elections at which Democrat Congresswoman Eddie Bernice Johnson and Republican Congressman Pete Sessions discussed and debated various health care reform questions and concerns.

Author of the thousands of publications and workshops these and other employment, employee benefits, health care, insurance, workforce and other management matters, Ms. Stamer also is a highly sought out speaker and industry thought leader known for empowering audiences and readers. Ms. Stamer’s insights on employee benefits, insurance, health care and workforce matters in Atlantic Information Services, The Bureau of National Affairs (BNA), InsuranceThoughtLeaders.com, Benefits Magazine, Employee Benefit News, Texas CEO Magazine, HealthLeaders, Modern Healthcare, Business Insurance, Employee Benefits News, World At Work, Benefits Magazine, the Wall Street Journal, the Dallas Morning News, the Dallas Business Journal, the Houston Business Journal, and many other publications. She also has served as an Editorial Advisory Board Member for human resources, employee benefit and other management focused publications of BNA, HR.com, Employee Benefit News, InsuranceThoughtLeadership.com and many other prominent publications. Ms. Stamer also regularly serves on the faculty and planning committees for symposia of LexisNexis, the American Bar Association, ALIABA, the Society of Employee Benefits Administrators, the American Law Institute, ISSA, HIMMS, and many other prominent educational and training organizations and conducts training and speaks on these and other management, compliance and public policy concerns.

Beyond these involvements, Ms. Stamer also is active in the leadership of a broad range of other professional and civic organizations. For instance, Ms. Stamer presently serves on an American Bar Association (ABA) Joint Committee on Employee Benefits Council representative; Vice President of the North Texas Healthcare Compliance Professionals Association; the current Co-Chair of the Defined Contribution Committee and Past Chair of the ABA RPTC Employee Benefits & Other Compensation Committee and former Welfare Benefit Plans Committee Chair and Co-Chair, on its Substantive Groups & Committee and Practice Management Vice Chair; Past Chair of the ABA Health Law Section Managed Care & Insurance Interest Group and a current member of its Healthcare Coordinating Council; current Vice Chair of the ABA TIPS Employee Benefit Committee; the former Coordinator and a Vice-Chair of the Gulf Coast TECE Council TE Division; on the Advisory Boards of InsuranceThoughtLeadership.com, HR.com, Employee Benefit News, and many other publications and seminar faculties. She also previously served as a founding Board Member and President of the Alliance for Healthcare Excellence, as a Board Member and Board Compliance Committee Chair for the National Kidney Foundation of North Texas; Regional Chair, Dallas Chapter President and on the Executive Committee of the Texas Association of Business; the Board President of the early childhood development intervention agency, The Richardson Development Center for Children; Chair of the Dallas Bar Association Employee Benefits & Executive Compensation Committee; a member of the Board of Directors of the Southwest Benefits Association, on the National Board of Directors and Dallas Chapter President of the Web Network of Benefit Professionals and in numerous other civic, professional and seminar faculty leadership roles.

Ms. Stamer practiced law as a partner with several prominent national and international law firms for more than 10 years before founding Cynthia Marcotte Stamer, P.C. In April, 2015, Ms. Stamer joined her firm, Cynthia Marcotte Stamer, P.C., with the practices of labor & employment attorney Robert G. Chadwick; and professional liability and civil litigation attorney Timothy B. Soefje, to form Stamer | Chadwick | Soefje, PLLC. A boutique firm of exceptionally experienced and skilled “big-firm” lawyers committed to changing the way law firms serve their clients, the firm focuses on advising and representing businesses and professionals nationally in the areas of healthcare, cyber liability, ERISA, employee benefits, labor & employment, corporate and commercial litigation, professional liability, construction litigation, and insurance defense

Stamer | Chadwick | Soefje, PLLC delivers sophisticated legal advice and innovative solutions to the most challenging and complex problems. Simply put, Stamer | Chadwick | Soefje, PLLC attorneys are “Solutions Lawyers™.” Stamer | Chadwick | Soefje, PLLC possess the breadth of experience to respond to the challenges the firm’s corporate and individual clients face and help guide them toward pragmatic resolutions that make sense for them. All three founding attorneys are rated AV® Preeminent™ by Martindale-Hubbell® Peer Review Ratings™ Ms. Stamer and Mr. Chadwick are both Board Certified in Labor & Employment Law by the Texas Board of Legal Specialization, are Fellows in the American Bar Foundation, and recognized as “Top Lawyers” in Labor and Employment Law. Ms. Stamer also has received recognition as a “Top” attorney in health care and employee benefits law and is a Fellow in the American College of Employee Benefit Council

For additional information about Ms. Stamer, see [here](http://www.stamerchadwicksoefje.com) or contact Ms. Stamer directly via email [here](mailto:stamer@stamerchadwicksoefje.com) or telephone at (469) 767-8872. For more information about Stamer | Chadwick | Soefje, PLLC, see www.stamerchadwicksoefje.com.

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