

Register Now!!!

“ERISA Claims & Appeals Boot Camp” Workshop

August 1, 2008

Attend Live Or Via Teleconference

HRCI & Texas Department of Insurance Continuing Education Credit Requested!!!

WHO SHOULD ATTEND

- Employers ● Insurers ● Other Plan Sponsors ● Plan Fiduciaries ● Third Party Administrators
- Fiduciary Liability Carriers ● Insurance & Employee Benefit Risk Managers ● Others

The United States Supreme Court’s June 19, 2008 decision in *Metropolitan Life Insurance Co. v. Glenn* is the latest in a series of regulatory and judicial developments that courts use to decide whether to overturn or uphold claims decisions made under ERISA-governed health, life, disability, retirement, severance and other employee benefit plans. Understanding and appropriately using these rules can help your plan’s claims decisions hold up in court.

ABOUT THE WORKSHOP

Employer and union plan sponsors, plan administrators and other fiduciaries, third party administrators and other service providers, fiduciary liability and errors and omissions insurers and others interested in learning more about strategies to position claims decisions to hold up in court, are invited to participate in the “ERISA Claims & Appeals Boot Camp.”

This workshop will be conducted on **August 1, 2008** from noon to 2:00 p.m. Central Daylight Time by attorney Cynthia Marcotte Stamer.

WHAT YOU WILL LEARN

Participants will:

- Learn about how ERISA’s fiduciary responsibility rules apply to claims and appeals investigations and decision-making;
- Learn about the core requirements that Department of Labor claims and appeals regulations provide must be satisfied in order to comply with ERISA’s reasonable claims and appeals procedures requirements;
- Learn the content that Department of Labor Regulations say must be included in explanations of benefits and other claims and appeals notifications;

- Be briefed about the *Glenn* decision and its potential implications for employee benefit plans and their sponsors, fiduciaries, service providers and administrators;
- Explore core practices and tips that can help enhance the defensibility of claims and appeals decisions;
- Hone awareness and understanding of these principles, practices, and strategies by participating in group discussion of hypothetical examples of common claims and appeals related scenarios.

The workshop is scheduled to begin promptly at 12:00 p.m. Central Time. Interested persons can participate in person in the Dallas offices of Glast, Phillips & Murray, P.C. located at 2200 One Galleria Tower, 13355 Noel Road, Dallas, Texas or by telephone. Check in for attendees participating in person will begin at 11:30 a.m. Central Time on the morning of the conference.

Interested parties may register and pay the registration fee of \$125.00 online at cynthiastamer.com or may complete and return the accompanying registration form along with the applicable \$125.00 registration fee via mail. For additional information, contact Bremelyn O’Sullivan at bosullivan@Solutionslawyer.net or via telephone at 972. 419.8388 to obtain a registration form via fax or e-mail.

PROGRAM REGISTRATION FORM
ERISA Claims & Appeals Boot Camp
August 1, 2008
12:00 p.m. Central Time

The workshop will be conducted live in the Dallas Offices of Glast, Phillips & Murray, P.C. with check in beginning at 11:30 a.m. Central Time and the briefing commencing promptly at noon Central Time. Parties unable to attend the live briefing can elect through advance registration to participate via telephone. Program handouts will be distributed via e-mail to participants registering in advance the morning of the program. To register, please complete the online registration form and pay the required registration fee online at cynthiastamer.com or complete and return this program registration form with check or money order in the amount of \$125 no later than 4:00 p.m. Central Time on July 28, 2008. Make checks or money orders payable to: "Cynthia Marcotte Stamer, P.C." and forward your registration form along with your payment to: Glast, Phillips & Murray, P.C., 2200 One Galleria Tower, Suite 2200, 13355 Noel Road, L.B. 48, Dallas, Texas, 75240, Attention: Cynthia Marcotte Stamer. For additional information, contact Bremelyn O'Sullivan at bosullivan@Solutionslawyer.net or via telephone at 972. 419.8388.

REGISTRANT INFORMATION

PLEASE REGISTER ME TO PARTICIPATE: (Check applicable) **the live presentation or** **via telephone**

Registrant Name:

Title: _____ **Organization:** _____

Street Address: _____
City, State, Zip Code _____

Telephone: _____ **Fax:** _____

E-mail: _____

PAYMENT INFORMATION

I acknowledge and agree that the participation of any registrant named in this registration is conditional upon the receipt of Cynthia Marcotte Stamer, P.C. of the applicable registration fee for each registrant of \$125.00. I hereby make payment as follows: (Check applicable)

- A check or money order is attached to this registration form or
- Charge the registration fee to my credit card.

Credit Card Type: **Master Card** **Visa** **American Express**

Account Number: _____ **Expiration Date:** _____

Cardholder Name: _____
Street Address: _____
City, State, Zip Code _____

By my signature below, I acknowledge and agree that I am authorizing the registration fee for my above registration to be charged to the credit card account set forth above. I represent that am the cardholder or an authorized user of the account of the cardholder and agree to pay in full the amount of such charges.

Cardholder Signature:

Date: _____

I would be interested in a briefing or other information about:

REGISTRATION POLICY: Payment by check or money order and completed registration form must be received at least 48 hours in advance of the program to complete registration. Returned checks shall not constitute payment and shall be subject to a \$50.00 administrative charge. Persons not registered at least 48 hours in advance will only participate subject to space availability. **CANCELLATION POLICY:** In order to receive credit, cancellation (either fax or mail) must be received at least 48 hours in advance of the meeting. Refunds will be made by check via first class mail postmarked within 60 days of receipt of written cancellation notice. **DISABILITIES ACCOMMODATION:** If you are an individual with a disability who requires accommodation to participate, please let us know at the time of your registration. **PROFESSIONAL CERTIFICATION OR CONTINUING EDUCATION CREDIT:** Upon request, participants will receive a certificate of participation documenting their participation in the program for use in demonstrating participation for continuing education, licensure or other continuing education credit. If you have special continuing education credit needs that you wish us to consider, please let us know. We are happy to visit with you about our ability to accommodate your request.

About Cynthia Marcotte Stamer

Board Certified in Labor & Employment Law, recognized in the International Who's Who of Professionals and bearing the Martindale Hubble AV-Rating, Cynthia Marcotte Stamer is a highly regarded legal advisor and consultant, author and speaker known for her more than 20 years experience advising and representing private and public employers, employer and union plan sponsors, employee benefit plan, insurance, financial services and other clients about employee benefit, employment, insurance, and related matters. As a core focus of her practice, Ms. Stamer regularly works with employer and other plan sponsors, employers, fiduciaries, administrators, insurers, and others to design, document, investigate and administer, and defend employment, employee benefit plan, insurance, and financial services plans, products, technologies and processes, their use, and administration.. She also assists employers, employee benefit plan fiduciaries, insurers and others to review, draft, negotiate and enforce insurance, managed care, administrative and other services contracts, claims and appeals investigations and determinations, administration forms and procedures, proposed regulations and legislation, privacy and other policies, credentialing and due diligence procedures, RFPs, and other materials and processes. Ms. Stamer also counsels and assists these clients to defend and respond to litigation and other disputes, government investigations and enforcement actions by the Department of Labor, the Internal Revenue Service, the Department of Health & Human Services, CAS,

and other federal and state regulatory authorities and to monitor and respond to legislative and regulatory proposals and enactments. In addition, Ms. Stamer also regularly authors materials and conducts workshops, professional, management and other training for a wide range of clients, professional and civic organizations and others on these and other matters including the American Bar Association, Aspen Publishers, the Bureau of National Affairs (BNA), the American Health Lawyers Association, SHRM, World At Work, Government Institutes, Inc., HRResource and many others. For a listing of some of these publications and programs, see cynthiastamer.com.

Chair of the American Bar Association (ABA) Health Law Section's Managed Care and Insurance Interest Group and Vice Chair of both the ABA Real Property, Probate & Trust Section Employee Benefits & Compensation Group and a liaison to the ABA Joint Committee on Employee Benefits, Ms. Stamer also has a lengthy resume of service to numerous professional and civic organizations. For instance, in addition to her many leadership involvements in the ABA, Ms. Stamer serves as a member of the IRS TEGE Council, a frequent contributing author to various publications for BNA, Aspen, SHRM, World At Work, HRResource and numerous other publishers, on the faculty and planning committees of a multitude of symposiums, and in numerous other leadership roles. She also previously served on the BNA EBCD Editorial Advisory Board, as Region IV Chair and a National Consultants Forum Board Member for the Society of Human Resources Management, Chair of

the Dallas Bar Association Employee Benefits and Executive Compensation Section, Continuing Education Chair and a member of the Board of the Southwest Benefits Association, on the National Board and Dallas Chapter President of Web Network of Benefit Professionals, as a State Executive Board Member and Dallas Chapter Chair of the Texas Association of Business, as President of the Alliance for Healthcare Excellence, on the Board and Compliance Committee Chair of the National Kidney Foundation of North Texas, as Board President of Richardson Development Center for Children, and in a host of other leadership roles.

Ms. Stamer's insights on employee benefits, human resources, insurance and related matters also have been quoted in The Wall Street Journal, various BNA and Aspen Publishing publications, the Dallas Morning News, Spencer Publications, Health Leaders, Business Insurance, the Dallas and Houston Business Journals and a host of other publications.

For more details about Ms. Stamer's experience, presentations, publications, involvements and other credentials, to inquire about engaging Ms. Stamer as legal counsel on a matter, to make a presentation to your organization, or to access information about upcoming and prior publications, workshops and other training, selected publications and other human resources related information, see CynthiaStamer.com or contact Ms. Stamer via telephone at 972.419.7188 or via e-mail at cstamer@solutionslawyer.net.

Important Notices Regarding This Communication

We hope that this information is useful to you. You can register to receive future updates and information about upcoming programs, access other publications by Ms. Stamer and other helpful resources or additional information about Ms. Stamer and/or Glast, Phillips & Murray, P.C. at CynthiaStamer.com or by contacting Ms. Stamer directly. If you or someone else you know would like to receive future updates and information about developments, publications or programs, please be sure that we have your current contact information – including your preferred e-mail. Interested persons can register or update their contact information by providing that information to us through registration on our website at www.cynthiastamer.com or via telephone, fax or e-mail. If you have questions or concerns about the matters discussed in this publication or other matters, wish to obtain information about arranging for training or presentations by Ms. Stamer, wish to suggest a topic for a future program or publication, or wish to request other information or materials, please contact Ms. Stamer using the contact information set forth below.

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arrange for encryption of our e-mail communications, please contact us at 972.419.7188.

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HOW TO CONTACT US. You can reach us by writing, telephoning or e-mailing Cynthia Marcotte Stamer, Managing Editor, Solutions Law Press, President, Cynthia Marcotte Stamer, P.C., a member of Glast, Phillips & Murray, P.C., 2200 One Galleria Tower, 13355 Noel Road, LB 48, Dallas, Texas 75240, Telephone (972) 419-7188, E-mail cstamer@solutionslawyer.net

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