



**Minutes from the Chapter Meeting of the
Austin Chapter of the Association of Legal
Administrators January 28, 2016 at 11:30 am,
Headliners Club**

President's Chapter Meeting Announcements

1. Summer Jurells (newly elected as new President-Elect to serve the remainder of the 2015-16 as well as the 2016-17 term). Summer to discuss CAPA membership drive.
2. Communications – Summer re Holly Monceaux stepping up as Chair of the Communications Committee.
3. Community Relations – Mike McDearmon re CAFB.
4. Business Partner - BP Kick-off event was a huge success.
5. New luncheon location starting in February. One Congress Plaza/Wells Fargo Bank Bldg. at 111 Congress Avenue on the 8th Floor. Parking in the Convention Center parking garage directly across the street. Working out details and announcement to come from the Education and Programs Committee with a listing of dates and speakers.
6. First Friday Coffee Chat – opportunity to visit with colleagues; starts Friday Feb. 5th from 7:30-8:30 a.m.
7. Managing Partner Breakfast – Reminder Feb. 16th, Steve Wingert speaking.
8. Annual Meeting next month – date change to February 24th. Conducting elections now (deadline tomorrow at 5), and we'll affirm the results at the annual meeting as required by our bylaws; we'll have a presentation on the state of the chapter and an update regarding the new year. No cost.

Luncheon Sponsor

Jennifer Barnett and Rex Engelhardt with DOCUmentation were the meeting sponsors.

Luncheon Speaker

Allison Kaylor Flink, Vice President, Consulting, of NFP Retirement spoke on the 401K Fiduciary Responsibilities. (See Attached)

Adjournment

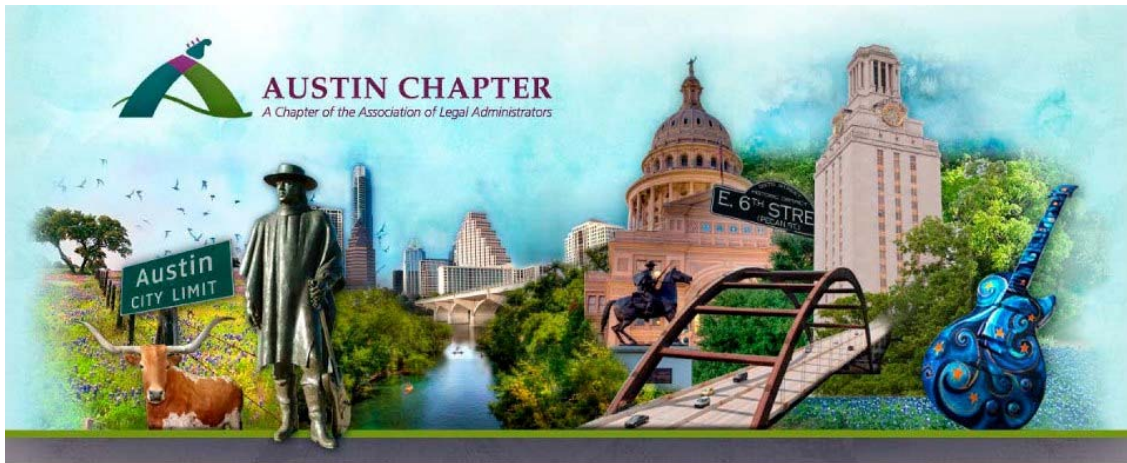
The meeting was adjourned at 1:00 PM.

Siegert, Linda

From: Austin ALA <AustinALA2@gmail.com@mail188.wdc02.mcdlv.net> on behalf of Austin ALA <AustinALA2@gmail.com>
Sent: Monday, January 25, 2016 5:42 PM
To: Siegert, Linda
Subject: Reminder-January Lunch & Learn

Austin ALA Lunch and Learn

[View this email in your browser](#)



Speaker: Allison Kaylor Flink, Vice President, Consulting of NFP Retirement

Session Title: 401K Fiduciary Responsibilities

Session Description:

Come join us for a rousing and lively discussion of fiduciary responsibilities and prudence for sponsors of qualified ERISA plans. While many may see this as a dry topic, the information presented will be very valuable to anyone in law firm management. Some of the topics covered are:

- Who is a fiduciary
- What are the core responsibilities
- Best practices of fiduciaries
- Current DOL and IRS focuses

- Update on Capitol Hill and the pressing changes coming regarding redefining who is a fiduciary advisor

Brief Speaker Bio: Allison is the Vice President, Consulting from NFP Retirement. She brings her vast experience in retirement plan consulting to clients in Texas as well as the East Coast. Allison's previous employers include Austin-based The Benefit Group, Pan Delta, Inc., The 401(k) Company, Guardian Pension Services, Hartford Retirement Services, ING, Lone Star Retirement Services and The 401(k) Concierge.

Allison focuses on the needs of each individual client, creating plan designs to help meet the needs of plan sponsors and participants. Allison works with clients of all sizes to assist with investment due diligence, provider benchmarking, advanced plan design and fiduciary compliance. Allison is a nationally recognized expert in ERISA issues and defined contribution services. She was named one of the 300 most influential advisors in the defined contributions business. She is also a founding adjunct lecturer at UCLA's TRAU (The Retirement Advisor University).

Sponsor: DOCUmentation

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Rex Engelhardt

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JOIN US AT

Headliners Club

20th Floor – Chase Tower

221 W. 6th Street Austin, TX 78701

Thursday, January 28, 2016

11:30 A.M. -1:00 P.M

Program Fee:

- \$30 for ALA Members
- \$40 for guests
- \$5 parking validation
- \$20 cancellation fee after 1/28/2016

RSVP due by noon, Tuesday 1/26/2016

RSVP



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