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## **Publications and Articles:**

### **Book Authorships**

- (1994). *Taxation of health and welfare benefits*. Warren, Gorham & Lamont.
- (1998, 2002). *Designing severance packages*. RIA Tax Advisors Planning Series.
- (1998). *VEBAs, cafeteria plans and other fringe benefit plans*. AICPA Course Book.

### **Articles**

- (January/February 2000) [Health and welfare benefits law: Constant refinement means practitioner awareness is critical.](#) Journal of Taxation of Employee Benefits.
- (January/February 2000) *Self-insured medical plans: Cost savings for employers, but design must consider nondiscrimination standards*. Journal of Taxation of Employee Benefits.
- (May/June 1999) *VEBAs may be the solution for clients' welfare benefit plans*. Journal of Taxation of Employee Benefits.
- (March/April 1999) *IRS finally issues new COBRA regulations*. Journal of Taxation of Employee Benefits.
- (January/February 1998) [Adoption assistance: The newest tax-favored employee benefit.](#) Journal of Taxation of Employee Benefits.
- (September/October 1997) *Creditable coverage certification rules under HIPAA impose another administrative burden for employers*. Journal of Taxation of Employee Benefits.
- (November/December 1996) [New cafeteria plan regulations remove conflicts with FMLA mandate.](#) Journal of Taxation of Employee Benefits.
- (September/October 1996) *Employee benefits claim litigation: Staying one step ahead of your adversary*. Journal of Taxation of Employee Benefits.

## Articles, Continued

(January/February 1996) [Avoiding the welfare benefit plan annual reporting landmines.](#) Journal of Taxation of Employee Benefits.

(May/June 1993) [Welfare plans increasingly require ERISA expertise.](#) Journal of Taxation of Employee Benefits.

(May 1991) *Revised age-discrimination law covers plans for older workers.* The National Law Journal.

(October 1987) *Qualified plan investments: The UBTI landmine.* Tax Times.

## Representative Presentations

“Zip Your Lips! The HIPAA Privacy Rule” and “What Happens in Health Care Stays in Health Care: The HIPAA Privacy Rule,” CIS 8<sup>th</sup> Annual Meeting & Risk Management Conference (February 12, 2009)

“HIPAA: Employer Responsibilities,” Local Government Personnel Institute 33<sup>rd</sup> Annual Conference (September 11, 2008)

“IRS & DOL Audits,” Oregon Society of Certified Public Accountants - 2007 Employee Benefits Conference (November 12, 2007)

“Self-Insured Arrangements; Multiple Employer Welfare Arrangements (MEWAs)” and “ERISA Q&A,” Association of Insurance Compliance Professionals Annual Meeting (October 28-31, 2007)

“Code Section 409A Deferred Compensation Arrangements,” Eugene-Springfield Tax Association (September 25, 2007)

“HIPAA Portability and Nondiscrimination Rules” and “ERISA Reporting and Disclosure Requirements,” Lorman Education Services (August 30, 2007)

“Litigation Update,” 2007 Los Angeles Benefits Conference (IRS/ASPAA/NIPA/WPBC) (January 25, 2007)

“Compliance Survival: COBRA, HIPAA and Privacy in Oregon,” Lorman Education Services (August 31, 2005)

“HIPAA Portability: Final Guidance is Out!” Western Pension & Benefits Conference – Portland Chapter 2005 Spring Seminar (April 20, 2005)

“Department of Labor ERISA Enforcement Initiatives,” Oregon Society of Certified Public Accountants – 2004 Employee Benefits Conference (November 8, 2004)

“COBRA: Compliance Requirements,” Western Pension & Benefits Conference – Portland Chapter (September 15, 2004)

“Cafeteria Plans 125/COBRA,” Lorman Education Services (July 15, 2004)

“COBRA” and “HIPAA Privacy Rules,” Lorman Education Services (May 20, 2004)

“ERISA, COBRA and HIPAA,” Lorman Education Services (October 23, 2003)

“ADA, FMLA, OFLA and HIPAA in Oregon: HIPAA Privacy Rules,” Lorman Education Services (August 7, 2003)

### **Representative Presentations, cont.**

“Benefits Fundamentals: Fiduciary/Legal,” Western Pension and Benefits Conference - Portland Chapter 2003 Spring Seminar (April 16, 2003)

“Nuts and Bolts of 401(k) Plans,” Lorman Education Services (November 13, 2002)

“Department of Labor Audits,” Oregon Society of Certified Public Accountants – 2002 Employee Benefits Conference (October 2002)

“Legal Environment of Health and Welfare Benefit Plans,” International Society of Certified Employee Benefits Specialists – Oregon Cascades Chapter (November 30, 2000)

“Patient Access to Responsible Care Act,” Western Pension and Benefits Conference – Portland Chapter 1998 Spring Seminar (April 7, 1998)

“Current Developments Affecting Fiduciary Responsibilities Arising Under Health and Welfare Benefit Plans,” Western Pension and Benefits Conference 1997 Annual Meeting, Phoenix (June 9, 1997)

“COBRA After 10 Years: Does Anyone Yet Know What It Means?” Western Pension and Benefits Conference 1996 Annual Meeting, Las Vegas (June 18, 1996)

“Employee Benefits Litigation: Staying One Step Ahead of Your Adversary,” Western Pension and Benefits Conference - Portland Chapter 1996 Spring Seminar (April 10, 1996)

“Non-Qualified Deferred Compensation Plans,” Eugene-Springfield Tax Association (October 24, 1995)

“Fiduciary Responsibilities of Pension Plan Trustees and Administrators,” sponsored by Progressive Securities Financial Services Corp. (October 11, 1995)

“Health and Welfare Benefits Update,” Western Pension and Benefits Conference - Portland and Seattle Chapters 1995 Spring Seminars (April 18 and 19, 1995)

“Ins and Outs of Perks for Executives,” American Conference Institute Annual Meeting (June 8, 1994)