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The 46th Annual Advanced Employee Benefits Workshop



*The Employee Benefits Section of the
Minnesota State Bar Association Invites
You to Be a Part of This Annual Tradition*

AREAS OF FOCUS INCLUDE:

- The Benefits Agenda: What to Expect in 2026
- IRS Updates and Initiatives
- The 2025-2026 Litigation Update
- And much more!

**Tuesday, February 3, 2026 –
Attend In Person Only**

Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370, Minneapolis

The 46th Annual
**Advanced
Employee
Benefits**
Workshop

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SCHEDULE

8:30 – 9:00 a.m.
CHECK-IN & CONTINENTAL BREAKFAST

9:00 – 9:05 a.m.
Welcome & Introduction
– *Allison A. Itami*
Planning Committee Member

9:05 – 10:05 a.m.
The Benefits Agenda: What to Expect in 2026 and Beyond

The expert policy staff of the ERISA Industry Committee provide insight on legislative issues, federal regulatory activity and recent developments affecting the benefits sector. Topics include paid leave, telehealth, state PBM regulations and ERISA pre-emption, Secure Choice, and more.
– *Dillon Clair*
Christina Strogis

10:05 – 11:05 a.m.
The 2025–2026 Litigation Update

Experienced attorneys will review recent case law developments from plaintiff and defense counsel perspectives, including how recent cases and trends shape litigation thinking and strategies. This will include a discussion of new Supreme Court cases and other trends in pension and healthcare disputes.
– *Andrew J. Holly*
Katherine L. MacKinnon
Kirsten E. Schubert

11:05 – 11:15 a.m.
BREAK

11:15 a.m. – 12:15 p.m.
BREAKOUT A (*choose one session*)

101
Let's Work it Out – An Interactive Workshop on Hot Topics Impacting Employee Benefits

Join this session, led by experienced attorneys, to discuss the issues and solutions to a variety of hot topics affecting your clients, including ICHRA as a response to Affordable Care Act cuts, fertility benefits focus from the Executive Order and tri-agency FAQs, Private Equity in 401(k)s, corporate security, Trump accounts, gender affirming care and more.

– *Darcy L. Hitesman & Megan E. Hladilek*

102
What Employee Benefit Attorneys Need to Know About Minnesota Paid Leave Law

The ever-changing employee benefits landscape has become more complex with Minnesota's new paid leave law. Attend this session for a practical overview of key paid leave issues.

– *Caitlin R. Gehlen*

12:15 – 12:30 p.m.
LUNCH (PROVIDED TO ALL ATTENDEES)

12:30 – 1:30 p.m.
LUNCH PRESENTATION
IRS Updates, Initiatives and Hot Topics Involving Retirement and Health and Welfare Benefits

Hear recent changes and developments.
– *Christina Cerasale*
Laura B. Warshawsky

1:30 – 1:40 p.m.
BREAK

1:40 – 2:40 p.m.
BREAKOUT B (*choose one session*)

201
Anatomy of an Employee Benefit Plan Vendor Agreement: The 2026 Legal Landscape

This session reviews best practices for plan sponsors when drafting and reviewing benefit plan vendor agreements, with a sharp focus on the critical legal and regulatory challenges anticipated in 2026. It includes a discussion of cybersecurity and data privacy (including vendor breach responsibilities and audit rights), evolving issues around ERISA fiduciary status and enhanced fee disclosure requirements and more.

– *Allison A. Itami & Monica A. Kelley*

202
Advising Clients About Executive Compensation in 2026

This discussion-based session will explore profit interest plans and other emerging issues in the dynamic landscape of executive compensation. Gain actionable strategies for designing compliant and shareholder-aligned executive compensation packages, planning for transitions, and more.

– *Audrey A. Fenske & Thomas B. Henke*

2:40 – 2:50 p.m.
BREAK

2:50 – 3:50 p.m.
The Fiduciary Exception To Attorney-Client Privilege: Ethical and Practical Considerations for Employee Benefits Attorneys

1.0 ethics credit applied for

This session will explore the ethical dilemmas and practical challenges that employee benefits practitioners face regarding the fiduciary exception to attorney-client privilege.
– *Aram V. Desteian, Eleanor E. Frisch & Stephen P. Lucke*

3:50 – 4:15 p.m.
Workshop Reception
Gather with your colleagues and friends for cheer, camaraderie and connection!

COURSE INFORMATION

LIVE IN PERSON
Tuesday, February 3, 2026
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

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Register online at www.minncle.org.
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COURSE MATERIALS
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