

# It's ERISA's 50th Birthday This Month!

## Let's celebrate ERISA with an informative Webinar on ERISA Fiduciary Requirements for Plan Sponsors



**Dorothy Cociu**, President,  
Advanced Benefit Consulting



**Marilyn Monahan**,  
Monahan Law Office



Wednesday, September 11, 2024

10 am – 12 noon Pacific Time



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**Program Overview:** Under ERISA, those who manage employee benefit plans are fiduciaries. Understanding what it means to be a fiduciary, and what responsibilities a fiduciary has to plan participants, is a critical part of plan administration. This program will provide an overview of who qualifies as a fiduciary, what it means to be a fiduciary, and what actions fiduciaries should (and cannot) take. We will discuss the US Department of Labor specific requirements for health plan sponsors and fiduciaries, including all notices and policies and procedures needed, including DOL Cybersecurity requirements. A discussion of tips, best practices, policies and procedures and available resources will be included.

### Learning Objectives/Outcomes:

- Learn who is a fiduciary and what responsibilities a fiduciary must satisfy
- Discussion of fiduciary standards applicable to non-ERISA plans
- Practical tips and best practices for meeting fiduciary responsibilities
- Understand what could happen if fiduciary rules are not followed
- Understanding specific fiduciary requirements for plan sponsors, including notices, policies and procedures and more

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## Speaker Bios

*Marilyn Monahan, ESQ, Monahan Law Office*

**Marilyn A. Monahan** is the owner of the Monahan Law Office in San Marcos. Marilyn focuses her law practice on advising employers and consultants on compliance with employee benefit and insurance laws, including ACA, ERISA, HIPAA, and COBRA. Her volunteer activities include serving as Secretary of the Employee Benefit Planning Association (EBPA). Marilyn has also served on the Board of Directors of the Professionals in Human Resources Association (PIHRA) (2008-2018). She has represented Advanced Benefit Consulting since its inception in 1995.

*Dorothy M. Cociu, RHU, REBC, GBA, RPA, President, Advanced Benefit Consulting*

Dorothy Cociu is the President of Advanced Benefit Consulting & Insurance Services, Inc.. She is a leading compliance consultant in the areas of ERISA, HIPAA Privacy & Security, The Affordable Care Act, CAA, Transparency in Coverage and other federal laws and regulations. She is a published author, with a compliance manual (The ABC's of HIPAA Compliance, published 2000, with updates), and over 90 articles published on the topics above, plus self-funding, cost containment, reference based pricing, and other employee benefits and compliance topics. Her firm specializes in large group employee benefits programs and benefits compliance.

Full Bios available at [www.advancedbenefitconsulting.com](http://www.advancedbenefitconsulting.com)

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