



▶ Electronic Distribution of SPDs and other Participant Communications

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As email, instant messaging, and Twitter become the norm, and with “green” being the color of the day, benefit plan sponsors and administrators are naturally interested in meeting their participant communication obligations via electronic means. Unfortunately, the applicable statutes and regulations have not kept up with reality. In fact, for many participants and beneficiaries, it is still easier to send pieces of paper than to jump through the hoops needed to allow for electronic dissemination of SPDs, forms and notices.

We’ll address the current IRS and Department of Labor guidance in this area, with practical suggestions on how to minimize the amount of paper used in plan administration.

MEET THE PRESENTERS

Julia M. Vander Weele, Partner - Spencer Fane Britt & Browne LLP, is a member of the Employee Benefits Group and the ERISA Litigation Group. Julia’s practice focuses on ERISA and other laws governing employee benefits, including matters affecting pension, profit sharing, 401(k), cafeteria plans and welfare plans.

David Y. Stevens, Associate - Spencer Fane Britt & Browne LLP, received his juris doctor, summa cum laude, from Indiana University School of Law and served as editor-in-chief of the Indiana Law Journal. Before joining Spencer Fane, David served as law clerk to the Honorable Deanell Reece Tacha, Chief Judge of the U.S. Court of Appeals, 10th Circuit.

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