February 13, 14 & 15, 2019

MONTEREY PLAZA
HOTEL & SPA

400 Cannery Row
Monterey, CA 93940
(800) 334-3999
www.montereyplazahotel.com
**Wednesday, February 13**

7:30 am – 3:00 pm  
Jack West Memorial Golf Tournament & Luncheon  
Poppy Hills Golf Course, 3200 Lopez Road, Pebble Beach, CA 93953

1:00 pm – 5:30 pm  
Vendor/Supplier Exhibit Set-up – Cypress Ballroom

1:00 pm – 7:00 pm  
Conference Registration – Cypress Ballroom Foyer

4:00 pm – 5:30 pm  
CMAC Board of Directors Meeting – Monterey Bay Room  
[Attendance limited to CMAC Board Members & Staff]

6:00 pm – 7:30 pm  
Opening Night Reception with Vendors – Cypress Ballroom

**Thursday, February 14**

7:00 am – 6:00 pm  
Conference Registration – Cypress Ballroom Foyer

7:30 am – 8:30 am  
Plated Breakfast with Vendors – Cypress Ballroom  
Vendor Introductions during Breakfast

8:30 am – 8:50 am  
Annual Membership Meeting and President’s Welcome  
Carmel Ballroom

9:00 am—10:00 am  
Guest and Spouse Breakfast  
Schooners Restaurant at the Monterey Plaza Hotel

9:00 am — 9:45 am  
General Session: ‘Employee Benefits Compliance Review—This Year and into the Future’  
Liliana Salazar, Esq., Chief Compliance Officer, Western Region, HUB International Ltd  
Carmel Ballroom

9:45 am — 10:15 am  
AM Break with Vendors - Cypress Ballroom

10:15 am – 11:00 am  
General Session: ‘California Government Relations Update’  
Jerry Desmond, Executive Vice President, CMAC  
Carmel Ballroom

11:00 am – 12:00 pm  
General Session: ‘Should Your Independent Contractors Now Become Employees?’  
John Mason, Esq. & Toby Magarian, Esq., Gurnee Mason & Forrestiere LLP  
Carmel Ballroom

**Thursday, February 14 (Continued)**

12:15 pm – 1:30 pm  
Plated luncheon with Vendors—Cypress Ballroom

12:15 pm - 12:45 pm  
Vendor Bingo Raffle

12:45 pm - 1:30 pm  
Lunch speaker: New Bureau Chief, Cemetery and Funeral Bureau [Will be Invited]  
‘Bureau Update’

1:30 pm – 2:15 pm  
General Session: ‘Company Culture and Providing Excellent Client Service’  
Art Sarkissian, Here & Now Consulting LLC  
Carmel Ballroom

2:15 pm – 5:15 pm  
Off-Site Tours of Carmel Mission and Dali17 at the Museum of Monterey [Ticketed Event]  
For More Information, See Page 8

2:15 pm - 2:30 pm  
Board & Ride Private Shuttle at Monterey Plaza Hotel  
[Snacks and Beverages will be provided on the shuttle]

3:00 pm - 3:45 pm  
Private Tour — Carmel Mission  
3080 Rio Road, Carmel, CA 93923

4:15 pm - 5:00 pm  
Private Tour — Dali17 at the Museum of Monterey  
5 Custom House Plaza, Monterey, CA 93940

5:15 pm  
Arrival back at Monterey Plaza Hotel & Spa

5:30 pm – 6:00 pm  
President’s Meeting with Vendors – Carmel Ballroom

6:00 pm – 6:30 pm  
Vendor/Supplier Exhibit Take-down – Cypress Ballroom

6:30 pm – 7:30 pm  
Reception – Lower Terrace, Outdoor Event [weather permitting]

7:30 pm – 9:00 pm  
Dinner – Monterey Bay Room

**Friday, February 15**

8:00 am – 9:00 am  
Breakfast Buffet – Carmel

**End of Program**

CMAC Program Committee:  
Scott Drolet, Forest Lawn Memorial—Parks & Mortuaries [Chair]  
Shawna de la Cruz, Forest Lawn Memorial—Parks & Mortuaries [Vice Chair]  
Monica Bracho, Inglewood Park Cemetery  
Kevin Brown, Inglewood Park Cemetery  
Cathy Fiorelli, Greenwood Memorial Park & Mortuary  
Kirk Hendricks, Christy Vault Company  
Merrill Mefford, Rose Hills Memorial Park  
Rick Miller, Inglewood Park Cemetery  
Leo O’Connor, Fairhaven Memorial Park  
John Resich, Green Hills Memorial Park  
Ray Sala, Cypress Lawn Memorial Park  
Steve Schacht, SCI  
Mike Wesner, Catholic Cemeteries of the Diocese of Orange
Here and Now Consulting LLC was developed around three very distinct guiding principals – Innovation, Agility & Execution.

**Innovation** is a critical part of how organizations and teams grow. Having a new perspective coupled with limitless creativity allows leaders to discover new ways of developing themselves, their teams and their business. Here and Now Consulting thrives on innovation.

**Agility** is one of the most important yet under-estimated competencies when it comes to Executive and Leadership development. Being able to adapt, change and align to new challenges and circumstances ensures successful results no matter what lies ahead. We are this agile.

**Execution** – creativity is a wonderful skill but without the knowledge and expertise of execution they will always remain as simply – ideas. We pride ourselves on having a strategic approach to leadership and executive team development, specializing in strategic planning coupled with enhancing team dynamics to execute these plans.

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**Art in his own words:**

“As founder of Here and Now Consulting I pride myself on building a company with three very strong values – Innovation, Agility and Execution.

“With a strong background in design and even stronger facilitation skills, I can design any program around strategy building, executive team dynamics, leadership development, exceptional service delivery, luxury service and executive coaching.

“Specializing in the design and facilitation of executive development programs, luxury resort and product programming and excellence in customer service education. The ability to design for a target audience across many industries allows me to first understand the core behaviors which drive an organization’s business metrics and then custom design programming for leaders and their teams to build agility and competence with those behaviors.

“One of my organization’s key areas is building mentoring programs and frameworks within organizations. Mentoring programs which I have designed have been used across the world including the United States, China and Europe.”
CMAC members may be asking themselves this question following the unanimous April 30 decision of the California Supreme Court in the Dynamex case [Dynamex Operations West, Inc. v. Superior Court].

Respected industry counselors at law, John Mason and Toby Magarian, Gurnee Mason & Forestiere LLP, will be discussing the provisions and ramifications of this important decision that impacts our industries and many others.

The business community is quite concerned that the court replaced the longstanding multi-factor Borello criteria that had been in place since 1989 and had been used for almost three decades in determining whether an individual is an employee or an independent contractor. In its place, the court established a new, three-part “ABC” criteria.

Under the ABC test, an individual must meet all three of these criteria to be considered an independent contractor:

- **Part A:** The worker is free from the hiring entity’s control and direction in connection with his/her performance of the work, both under the contract for performance of the work and in actually performing the work;

- **Part B:** The worker performs work that is outside the usual course of the hiring entity’s business; and

- **Part C:** The worker is customarily engaged in an independently established trade, occupation or business of the same nature as the work performed.

Also, although the decision is specific to an industry and wage order compliance, the implications extend beyond that industry.

it is possible that an individual determined to be an employee for one purpose is characterized as an employee for all purposes.
SPECIAL TOPIC: ‘Employee Benefits Compliance Review—This Year and into the Future’
Liliana Salazar, Esq., Chief Compliance Officer, Western Region, HUB International Ltd

Join us for a year-end employee benefits compliance review and explore what’s down the road in 2019 and beyond. Receive tips on asking the right compliance questions of vendors who offer assistance. Learn what it takes to safely navigate federal and state regulations for full compliance.

The Past - A Compliance Retrospective – What took effect? What changed?
Affordable Care Act (ACA)
ACA Repeal Efforts
Employer Pay or Play Update
ACA reporting
Exchanges and premium subsidies
Medicaid expansion
ACA taxes

The Present – Where are we now?
Wellness program, the ADA and GINA rules
New disability claim procedures
IRS guidance on tax implications of fixed indemnity plans/Section 125 Plans
Includes hospital confinement, critical illness, or similar plans that pay a fixed amount per occurrence
Paid by an employer or employee-paid on pre-tax basis
Current state of health reform

The Future – What emerging healthcare trends have legal compliance issues?
Single Payer Programs – what do they mean to you as an employer sponsor of benefits?
Breakdown of state developments and how they affect group health plans
Self-insurance/Reference-based pricing
Increasingly popular strategies for managing health plans
Both have significant compliance implications when not properly managed Medicare vs. employer sponsored coverage

About Liliana Salazar, Esq.—As Chief Compliance Officer for the Western Region for HUB International Limited, Liliana is responsible for addressing public and private employers’ health and welfare responsibilities under federal and state laws and city ordinances. She works closely with HUB’s service teams and clients to develop short- and long-term strategies that will allow clients to remain in compliance while addressing clients’ financial and human capital needs.

Liliana interacts with regulatory agencies such as the Department of Labor, the Internal Revenue Service, the U.S. Treasury Department, the Centers of Medicare and Medicaid Services, the Department of Health and Human Services, the Equal Employment Opportunity Commission and state insurance departments to discuss the applicability of laws and regulations to group health plans.

Liliana possesses 20 years of experience in addressing the compliance and regulatory needs of employers and their group health plans. She actively worked with carriers and clients in ensuring their compliance with the HIPAA Privacy, Security, and HITECH Act rules, GASB 45 obligations, and more recently the Patient Protection and Affordable Care Act (PPACA or ACA). Prior to joining HUB, Liliana was National Practice Leader for the Employee Benefits Compliance Practice of Wells Fargo Insurance Services, and Vice President of Compliance for ABD Insurance Services.
Networking Opportunities to Enhance Interaction

Our vendors are essential to the success of our conference. With this in mind, the CMAC Program Committee has developed a conference structure intended to enhance the opportunities for interaction among our conference attendees. These include:

**Bingo Raffle**
CMAC will incentivize visits to our vendor displays with a bingo card that—upon completion—provides entry to raffle prizes provided by CMAC and our vendors.

We appreciate your help with our Bingo Card. Please provide your logos by January 31 as we will be producing the cards ahead of the event.

**Reduced Fees for Multiple Attendees**
Tell a friend and bring a colleague! CMAC has reduced registration fees for additional associate member attendees from the same company.

**Reduced Fees for Non-Member Cemeterians**
CMAC is offering reduced registration fee for attendees if either of the following applies: their cemeteries have not been members for the past five years; or they have not attended a CMAC conference for the past five years. Please pass this along to your customers with our welcome!

**Vendor Introductions Start the Day**
The full-day schedule will begin on Thursday with vendor introductions during breakfast.

**Prime Time Tour**
Prime Thursday afternoon hours are dedicated to an off-site bus trip to Carmel Mission and Dali17 at the Museum of Monterey.

**Activities Held in Vendor Display Room**
The Opening Night Reception, Thursday Breakfast and Thursday Luncheon will each be held in the vendor display room.

**Golf Tournament**
The traditional kick-off golf event provides a relaxing and enjoyable couple of hours at a premier course at a world-renown golfing destination—Monterey!
The Monterey Plaza Hotel & Spa

Monterey Plaza Hotel & Spa is a luxurious hotel that traces its roots to the early 1900s, when the historic House of the Waves estate graced the same idyllic shoreline.

Today, as the grand dame of the bay, Monterey Plaza provides its guests with classic, coastal hospitality refreshed by a spirit of conviviality. Attentive, personalized service is their hallmark, and they endeavor to ensure guests find their needs seamlessly met by genuinely caring associates.

From accommodations to entertainment, cuisine and service, Monterey Plaza delivers engaging new experiences with all the classic comfort and quality of an iconic oceanfront luxury hotel.

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ROOM RESERVATIONS AT THE MONTEREY PLAZA HOTEL & SPA

CMAC has negotiated a special Group Room Rate of $205 [Inland View] per night!

CMAC has also negotiated special room rates for rooms with a partial ocean view [$265], a harbor view [$315] and a harbor view with balcony [$385]. If you are interested in upgrading to one of these rooms, we suggest making an early room reservation as inventory is limited.

In order to receive the special Group Room Rate, please call reservations at (800) 334-3999 and identify the name “Cemetery and Mortuary Association”.

The deadline to make room reservations under the Group Block is Friday, January 11, 2019 at 4:00 pm.

Please be advised to make your room reservations early as the room block may sell out prior to the cutoff date.
TOURS OF CARMEL MISSION AND DALI MUSEUM

The CMAC Program Committee has made arrangements for conference attendees and guests to tour both the Carmel Mission and the Dali Museum. Come join friends and colleagues for a relaxing afternoon of visits to two iconic Monterey/Carmel regional sites. Snacks and beverages included!

Registration Fee for both Tours: $60
[See Schedule of Activities on Page 2 for date and time details. Register on Page 10]

Carmel Mission
3080 Rio Road  Carmel, CA 93923
www.carmelmission.org

The Basilica of San Carlos Borromeo de Carmelo Mission (Carmel Mission) was founded by Father Junipero Serra in 1770, making it the second of the 21 California missions. Though San Carlos Borromeo de Carmelo Mission was founded in Monterey, it was quickly decided that Carmel-by-the-Sea was a more appropriate location for its purpose. The fledgling establishment was moved to the Rio Road site in 1771 and the Carmel Mission was dedicated in 1797. Father Serra was buried within its grounds. San Carlos Borromeo de Carmelo Mission is considered the most authentically restored Franciscan mission, and despite its many events and services, the Carmel Mission’s courtyard and gardens are peaceful places to meditate or rest.

Dali17 at the Museum of Monterey
5 Custom House Plaza  Monterey, CA 93940

Dali17 is the first permanent West Coast exhibition of surrealist artist Salvador Dali. It is located at the Museum of Monterey and the exhibition features the country’s largest private collection with over 580 works including lithographs, etchings, rare sculptures and tapestries.

The name Dali17 ties Dali’s influence and history to the original 17 Mile Drive, where he lived and worked. Monterey was the only place outside of Spain where Dali lived and painted. This exhibition centers around the premise to revive Dali’s local history by showcasing his influence locally and capturing the rich history that ties him to the Monterey region.

Shuttle bus transportation and admission tickets to both venues will be provided.

GUEST AND SPOUSE BREAKFAST

Guests and spouses of our conference attendees are invited to participate in a special breakfast on the morning of Thursday, February 14.

Guests will be treated to a leisurely breakfast and a specially selected gift to remember their stay in Monterey.

Jack West Memorial Golf Tournament and Luncheon [On-site luncheon after tournament]

Wednesday, February 13  7:30 AM—3:00 PM
$199 Per Player

Poppy Hills Golf Course
3200 Lopez Road  Pebble Beach, CA 93953
(831) 622-8239  www.poppyhillsgolf.com

CMAC Program Committee Golf Chair, Kevin Brown, Inglewood Park Cemetery, has arranged for a very special golf outing and luncheon at the renowned course, Poppy Hills on the Monterey Peninsula.

Poppy Hills is a challenging, par-72 venue that weaves through the Del Monte Forest and plays host to several renowned tournaments, including the AT&T Pebble Beach National Pro-Am. This is a beautiful, tree-lined layout featuring large, undulating greens, many of which are well-protected by water and bunkers.

Registration fee includes greens fee, cart fee, range balls, continental breakfast, luncheon after play and prizes!
CMAC MEMBER REGISTRATION LEVELS

CMAC CEMETRY MEMBER FULL CONFERENCE
Includes: Opening Reception, Thursday and Friday Breakfasts, All General Sessions, Thursday Luncheon, Thursday Reception and Dinner.
A. $594 PER PERSON [Circle A on Registration Page 10]

CMAC ASSOCIATE [SUPPLIER] MEMBER FULL CONFERENCE
Includes: Opening Reception, Thursday and Friday Breakfasts, All General Sessions, Thursday Luncheon, Thursday Reception and Dinner and [1] Vendor Display Table Per Company
B. $656 PER PERSON [First Registrant - Circle B on Registration Page 10]
C. $459 PER PERSON [Additional Registrants from the Same Company - Circle C on Registration Page 10]

CMAC CEMETRY MEMBER THURSDAY ONLY
Includes: Thursday breakfast, All General Sessions and Luncheon.
D. $398 PER PERSON [Circle D on Registration Page 10]

NON-MEMBER REGISTRATION LEVELS

CEMETERIAN NON-MEMBER FULL CONFERENCE
Includes: Opening Reception, Thursday and Friday Breakfasts, All General Sessions, Thursday Luncheon, Thursday Reception and Dinner.
E. $844 PER PERSON [Circle E on Registration Page 10]

SUPPLIER NON-MEMBER FULL CONFERENCE
Includes: Opening Reception, Thursday and Friday Breakfasts, All General Sessions, Thursday Luncheon, Thursday Reception and Dinner and [1] Vendor Display Table Per Company
F. $844 PER PERSON [First Registrant - Circle F on Registration Page 10]
G. $591 PER PERSON [Additional Registrants from the Same Company - Circle G on Registration Page 10]

ADDITIONAL EVENTS

JACK WEST MEMORIAL GOLF TOURNAMENT
Poppy Hills Golf Course, Pebble Beach
Includes: Range balls, Round of Golf, Cart, Continental Breakfast, Luncheon [after play] and Prizes.
H. $199 PER PLAYER [Circle H on Registration Page 10]

GUESTS/SPOUSES of ATTENDEES
Includes: Opening Reception, Special Thursday Guest Breakfast, Thursday Reception and Dinner.
Note: A Guest/Spouse must be someone who does not work in the industry.
I. $481 PER PERSON [Circle I on Registration Page 10]

THURSDAY TOURS OF CARMEL MISSION AND DALI17 AT THE MUSEUM OF MONTEREY
Includes: Ticketed admission to both the Carmel Mission and Dali17 Museum and transportation from the Monterey Plaza Hotel via private shuttle.
J. $60 PER PERSON [Circle J on Registration Page 10]

THURSDAY RECEPTION AND DINNER ONLY
Includes: Thursday Reception and Dinner.
K. $206 PER PERSON [Circle K on Registration Page 10]

FIRST TIME ATTENDEES - SPECIAL RATE!
CMAC would like to get to know you and is offering a discounted registration to attend our 2019 conference.

FIRST TIME ATTENDEE* 
Includes: Opening Reception, Thursday and Friday Breakfasts, All General Sessions, Thursday Luncheon, Thursday Reception and Dinner
L. $416 PER PERSON [Circle L on Registration Page 10]
* First Time Attendee Eligibility - CMAC is offering reduced registration fee for attendees if either of the following applies: their cemeteries have not been members for the past five years; or they have not attended a CMAC conference for the past five years.
Please register by Monday February 4 by completing the following form and returning it to us:

BY MAIL: CMAC
925 L Street, Suite 260
Sacramento, CA 95814

BY FAX: 916.441.3520

BY EMAIL: CMAC@usa.net

QUESTIONS: 916.441.4533

YOUR COMPANY NAME:

PROPERTY/COMPANY NAME

ADDRESS

CITY     STATE     ZIP

PHONE

ATTENDEE REGISTRATION INSTRUCTIONS:

Each registration fee is indicated by a letter [A through L] on page 9.

Please indicate your participation in the conference events by circling the letters below and entering the corresponding fee amount.

If you would like to receive 2019 Annual Conference updates by email, please include individual email addresses with the name of attendees as listed below.

__________________________________________________
FIRST ATTENDEE NAME

EMAIL

A B C D E F G H I J K L Amount Due $_____________

__________________________________________________
ADDITIONAL ATTENDEE NAME

EMAIL

A B C D E F G H I J K L Amount Due $_____________

__________________________________________________
ADDITIONAL ATTENDEE NAME

EMAIL

A B C D E F G H I J K L Amount Due $_____________

TOTAL DUE: $______________________________

PAYMENT OPTIONS:

CHECK:________[Please make checks payable to CMAC]

CREDIT CARD: ______VISA ______M/C ______AM/EX

CARD NUMBER

EXP DATE    SECURITY CODE

AMOUNT TO BE CHARGED

BILLING NAME

BILLING ADDRESS

CITY     STATE     ZIP

Cemetery and Mortuary Association of California  ●  925 L Street, Suite 260, Sacramento CA 95814  ●  www.CMACCAlifornia.org

P: (916) 441-4533  Fax: (916) 441-3520
The generous sponsorship contributions of individuals and companies are welcomed and appreciated!

For more information, please feel free to contact CMAC Program Committee Chair, Scott Drolet, Forest Lawn Memorial—Parks & Mortuaries at (800) 204-3131 or Jerry Desmond, CMAC Executive Vice President at (916) 441-4533.

This sponsorship form can be faxed to CMAC at (916) 441-3520 or mailed to CMAC at 925 L Street, Suite 260, Sacramento, CA 95814. Questions? Please call the CMAC office at (916) 441-4533.

**SPONSORSHIP LEVELS and RECOGNITION DESCRIPTIONS:**

- **PLATINUM** $1000 AND ABOVE
  - Gold level recognition plus:
    - Logo and company name on Conference Program back cover

- **GOLD** $750
  - Silver level recognition plus:
    - Logo and company name on PowerPoint run during all conference breaks

- **SILVER** $500
  - Bronze level recognition plus:
    - Logo and company name on signage board at conference registration table

- **BRONZE** $250
  - Company name announced from the podium during general session
  - Recognition of company sponsorship in email blasts to CMAC members and conference attendees
  - Recognition of company sponsorship on the CMAC website

**SPONSORSHIP SIGN-UP & PAYMENT**

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CITY STATE ZIP
Golf Tournament Sponsorship Opportunities

Ladies and Gentlemen,

I’m once again heading up the CMAC Golf Tournament and we are scheduled to play at Poppy Hills Golf Course in Pebble Beach, CA. The course is located about 15 minutes from the Monterey Plaza Hotel. The golf tournament will be held on Wednesday, February 13, 2019 in conjunction with the CMAC Annual Conference.

As many of you know, Poppy Hills Golf Course is one of the premier golf courses on the Monterey Peninsula.

With this premier location, we are looking to raise additional funds to offset a portion of the total cost, so our players can have a great day on the course.

Best Regards,

Kevin Brown

Sign Me Up as a Golf Sponsor!

_______________________________________________________  
NAME

_______________________________________________________  
COMPANY

_______________________________________________________  
EMAIL

SPONSORSHIP LEVELS:

☐ Sponsor the Continental Breakfast - $500  ☐ Sponsor the Luncheon - $1000

☐ General Sponsorship - $500  ☐ Tournament Prizes - $250  ☐ Other - $___________

This sponsorship form can be faxed to CMAC at (916) 441-3520 or mailed to CMAC at 925 L Street, Suite 260, Sacramento, CA 95814. Questions? Please call the CMAC office at (916) 441-4533.

PAYMENT OPTIONS:

CHECK:_________ [Please make checks payable to CMAC]  

_______________________________________________________  
CREDIT CARD: _______VISA _______M/C _______AM/EX

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CARD NUMBER

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SECURITY CODE

_______________________________________________________  
AMOUNT TO BE CHARGED

_______________________________________________________  
BILLING NAME

_______________________________________________________  
BILLING ADDRESS

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CITY

_______________________________________________________  
STATE

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ZIP