Wealth Advisory Group
2017 Spring Fiduciary Summit

You are cordially invited to join Philadelphia area 401(k), 403(b), and Retirement Plan Sponsors as we gather for the 2017 Spring Fiduciary Summit. The summit is an educational workshop for CFOs, Human Resources & Finance Executives, Business Owners, and Fiduciaries to discuss retirement plan best practices and strategies. Our diverse group of industry experts and plan sponsors makes it a can't miss event.

TOPICS OF DISCUSSION:

- What Fiduciaries needs to know and do for the new DOL Fiduciary Ruling
- Fiduciary Risk in Health & Welfare Plans
- Market volatility, the Presidential policies, geopolitical tension, and what this mean for the investors and Plan Sponsors.
- Best practices for retirement plan investment oversight, menu construction, as well as participant education and communications.
- Retirement Plan Benchmarking and RFP Best Practices

KEYNOTE SPEAKERS:

- Jeffrey Paguirigan, BlackRock Defined Contribution Consultant
- Andrew Dugery, CRPS®, AIF®, Investment & Qualified Retirement Plan Advisor, Wealth Advisory Group, Inc.
- Robert A. Norton, Jr., CFA®, Wealth Advisory Group, Inc.
- Richard Craft, AIF®, ChFC, CLU, Wealth Advisory Group, Inc.
- Michael Bass, AIF®, CEO, Corporate Benefits Alliance, Inc.

DATE AND TIME: Wednesday, May 31, 2017 from 8:30 AM to 10:30 AM

LOCATION: Wealth Advisory Group Executive Conference Room, 1055 Westlakes Drive, Suite 130, Berwyn, PA 19312

CONTINUING EDUCATION CREDITS: 2 Hours of HRCI

TO RSVP: Click here, or email Andrew Dugery at Dugery@WAGAdvisors.com.

SEATING IS LIMITED. PLEASE RESERVE YOUR SEAT ASAP. BREAKFAST WILL BE SERVED.

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