

Wealth Advisory Group

2017 Fall Fiduciary Summit

You are cordially invited to join Philadelphia area 401(k), 403(b), and Retirement Plan Sponsors as we gather for the 2017 Fall 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 need to know about the DOL's "Conflict of Interest Rule".
- How to mitigate 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 Target Date Fund & investment oversight, menu construction, as well as participant education, financial wellness, and communications.
- How to use Plan Benchmarking to lower costs and improve services.

KEYNOTE SPEAKERS:

- Eugene F. Maloney, Executive Vice President and Corporate Counsel of Federated Investors
- Chris Zarcaro, CIMA®, CRPS®, QPFC, Vice President, Fidelity Institutional Asset Management
- Richard Craft, AIF®, ChFC, CLU, CEO, Wealth Advisory Group, Inc.
- Michael Bass, AIF®, CEO, Corporate Benefits Alliance, Inc.
- Andrew Dugery, CRPS®, AIF®, Wealth Advisory Group, Inc.
- Robert A. Norton, Jr., CFA®, Wealth Advisory Group, Inc.

DATE AND TIME: Tuesday, October 24th, 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: 1 hour of CPA CPE, 2 Hours of HRCI, SHRM

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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