

2013 SAN DIEGO

FIDUCIARY SUMMIT

PRESENTED BY



OPPENHEIMER FUNDS™
THE RIGHT WAY TO INVEST



Prudential



Eaton Vance
Investment Managers



PRESENTED BY

MAXIS SOLUTIONS
241 14TH ST. SAN DIEGO
CALIFORNIA, 92101

YOU ARE CORDIALLY INVITED TO ATTEND THE
2013 SAN DIEGO

SPEAKERS:

PAUL NEUNER

MANAGING DIRECTOR - INVESTMENT OFFICER
WELLS FARGO ADVISORS, LLC.

DR. JEAN TWENGE

SDSU DEPARTMENT OF PSYCHOLOGY &
AUTHOR OF *GENERATION ME*

TOPICS OF DISCUSSION:

- HOW TO MEASURE PLAN SUCCESS
- REDUCING YOUR FIDUCIARY LIABILITY
- MAXIMIZING EMPLOYEE OUTCOMES - TARGETED MULTI-GENERATIONAL PARTICIPANT COMMUNICATION
- COMPLIANCE: FOLLOWING THE PROPER POLICIES & PROCEDURES
- UPDATES ON RECENT & UPCOMING LEGISLATION

COST:

\$150 REGISTRATION FEE WAIVED FOR A LIMITED
NUMBER OF EARLY REGISTRANTS

WE ARE ABLE TO ACCOMMODATE TWO ADDITIONAL COLLEAGUES FOR THE WAIVED FEE

SPENCER THOMAS | 619-795-2330

STHOMAS@MAXIS-SOLUTIONS.COM

***THIS EVENT IS CERTIFIED FOR 3 HOURS OF CPA/CPE CREDIT AND HRCI/SPHR GENERAL CREDIT**

The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that the program has met the HR Certification Institute's Criteria to be pre-approved for recertification credit.

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FIDUCIARY SUMMIT*

WHERE

UNIVERSITY CLUB
ATOP SYMPHONY TOWERS
750 B ST. #3400
SAN DIEGO, CA 92101

WHEN

THURSDAY, DECEMBER 12 2013
9:00 AM TO 12:00 PM PST
(BREAKFAST SERVED)