

2014 TENNESSEE

FIDUCIARY SUMMIT

PART OF THE 2014 RETIREMENT PLAN ROADSHOW



BUTLER | SNOW





XPNENTIAL GROWTH SOLUTIONS
110 WEST C ST, SUITE#2001
SAN DIEGO, CA 92101

YOU ARE CORDIALLY INVITED TO ATTEND THE 2014 TENNESSEE FIDUCIARY SUMMIT

PRESENTED BY:
WELLS FARGO ADVISORS

SPEAKERS:

JAMES LYDAY
FINANCIAL ADVISOR —
WELLS FARGO ADVISORS, LLC

JENNIFER KIESEWETTER
PARTNER —
BUTLER SNOW

JULY 30, 2014
11:00 AM - 2:30 PM

VANDERBILT UNIVERSITY
2201 WEST END AVE.
NASHVILLE, TN 37240

MARK BLACKBURN
ACCOUNTING & ASSURANCE PARTNER —
LATTIMORE BLACK MORGAN AND
GAIN P.C.

DAVE DONALDSON
FORMER SR DOL INVESTIGATOR,
PRESIDENT & CEO —
ERISA SMART

THOUGHT LEADERSHIP TOPICS:

- WHAT EVERY FIDUCIARY NEEDS TO KNOW FOR 2014
- PREFERRED INVESTMENT STRATEGY PANEL DISCUSSION
- INDUSTRY EXPERT PANEL — INSIGHTS, LOCAL PERSPECTIVE, Q & A
- TARGET DATE FUND PANEL
- CASE STUDIES - SUCCESS STORIES & INSIGHTS FROM LOCAL PEERS

COST: \$150 REGISTRATION FEE WAIVED FOR FIRST 15 LOCAL
PLAN SPONSOR RESPONDENTS

3 HOURS CPE/CPA CREDIT, 3 HOURS OF HRCI/SPHR/PHR/GPHR CREDIT, 3 HOURS OF CEBS CREDIT
FOR ADDITIONAL DETAILS AND TO RSVP CONTACT:

MIKE KNODLE | 619-450-1559 | MKNODLE@XGROWTHSOLUTIONS.COM

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