

# 2014 TENNESSEE FIDUCIARY SUMMIT

PART OF THE 2014 RETIREMENT PLAN ROADSHOW



BUTLER | SNOW





Xponential 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

**MARK BLACKBURN**  
ACCOUNTING & ASSURANCE PARTNER –  
LATTIMORE BLACK MORGAN AND  
CAIN P.C.

**JENNIFER KIESEWETTER**  
PARTNER –  
BUTLER SNOW

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

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

**VANDERBILT UNIVERSITY**  
2201 WEST END AVE.  
NASHVILLE, TN 37240

**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 KNOODLE | 619-450-1559 | [mknode@xgrowthsolutions.com](mailto:mknode@xgrowthsolutions.com)**

The terms of this seal are undergoing by the HFI Certification Institute of the quality of the program. It means that this program has met the HFI Certification Institute's criteria to be approved for recertification credit.

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