

2014 ALABAMA FIDUCIARY SUMMIT

PART OF THE 2014 RETIREMENT PLAN ROADSHOW



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XPONENTIAL GROWTH SOLUTIONS
110 WEST C ST, SUITE #200 J
SAN DIEGO, CA 92101

YOU ARE CORDIALLY INVITED TO ATTEND THE 2014 ALABAMA FIDUCIARY SUMMIT

HOSTED BY:
XPONENTIAL GROWTH SOLUTIONS

KEYNOTE SPEAKERS:

**RENN WILLIAMS &
ANDREW BLANKENSHIP**
J. SMITH LANIER & CO. RETIREMENT
SERVICES GROUP

ANGELA COKER
AUDIT PARTNER —
SELLERS, RICHARDSON, HOLMAN & WEST LLC

JOHN CHOATE
FORMER US NAVY SEAL

JOE LASSITER
PARTNER —
PEARCE, BEVILL, LEESBURG,
MOORE, P.C.

BOB ELLERBROCK
ERISA COUNSEL —
BALCH & BINGHAM LLP

**OCTOBER 23, 2014
11:30 AM - 3:00 PM**

**THE CLUB
1 ROBERT S SMITH DR
BIRMINGHAM, AL 35209**

TOPICS OF DISCUSSION:

- WHAT EVERY FIDUCIARY NEEDS TO KNOW FOR 2014 & 2015
- TARGET DATE FUND PANEL: FEATURING SENIOR PORTFOLIO MANAGERS
FROM: AMERICAN CENTURY, T. ROWE PRICE, AND PUTNAM INVESTMENTS
- LOCAL INDUSTRY EXPERT PROFESSIONAL PANEL
- LOCAL CASE STUDIES - IMPROVING PLAN OUTCOMES

COST: \$150 REGISTRATION FEE WAIVED FOR FIRST 15
QUALIFIED RESPONDENTS

3 HOURS CPA/CPE CREDIT, 3 HOURS HRCI/SPHR/PHR/GPHR, 3 HOURS CEBS CREDIT

FOR ADDITIONAL DETAILS AND TO RSVP CONTACT: **MIKE KNODLE -**
619-450-1559 - MKNODLE@XGROWTHSOLUTIONS.COM

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