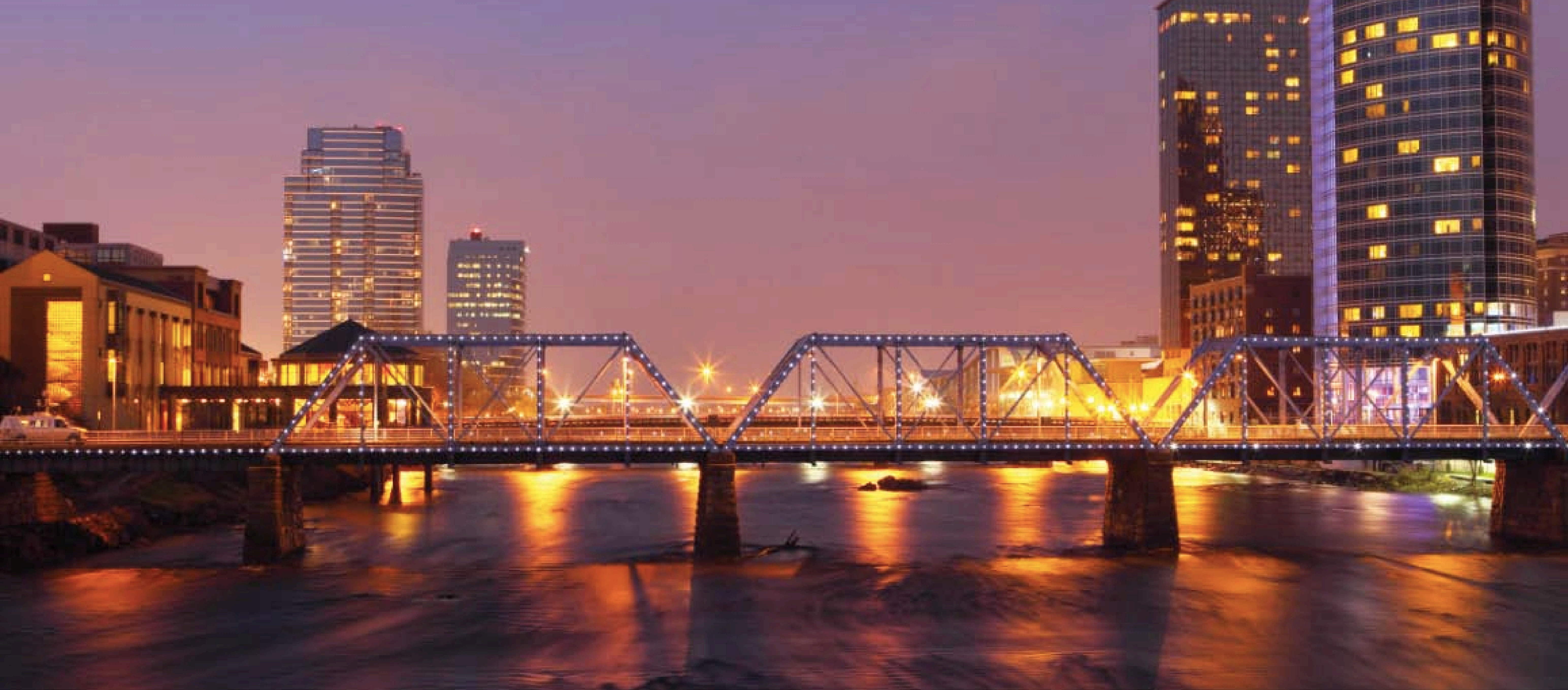
2014 MICHIGAN FIDUCIARY SUMMIT

PART OF THE 2014 RETIREMENT PLAN ROADSHOW



XPONENTIAL

SHA RETIREMENT GROUP

Hungerford Nichols

MILLER JOHNSON

Lighthouse Group INSURANCE · TITLE

CPE SPONSORS

Pre-Approved

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

YOU ARE CORDIALLY INVITED TO ATTEND THE

2014 MICHIGAN FIDUCIARY SUMMIT

HOSTED BY:
SHA RETIREMENT GROUP

KEYNOTE SPEAKERS:

KELLEY F. SNOOK, JR.
AIF – PRESIDENT
SHA RETIREMENT GROUP

DIANE GALLAGHER
VP DCIO PRACTICE MANAGEMENT
AMERICAN CENTURY

TRICIA VAN VLIET
CPA PLAN BENEFITS & CONSULTING
HUNGERFORD NICHOLS

DAVE ANDERSON
VP – RETIREMENT CONSULTANT
SHA RETIREMENT GROUP

LISA MURPHY
SR. ACCOUNT MANAGER-BENEFITS
LIGHTHOUSE GROUP

FRANK BERRODIN
MEMBER
MILLER JOHNSON

OCTOBER 30, 2014
8:00 AM - 11:30 AM

GRAND VALLEY STATE UNIVERSITY
EBERHARD CENTER
301 WEST FULTON ROOM 210
GRAND RAPIDS, MI 49504

TOPICS OF DISCUSSION:

- WHAT EVERY FIDUCIARY NEEDS TO KNOW FOR 2014 & 2015
- TARGET DATE FUND PANEL: FEATURING SENIOR PORTFOLIO MANAGERS FROM: AMERICAN CENTURY, PIMCO, INVESCO
- LOCAL INDUSTRY EXPERT PROFESSIONAL PANEL
- LOCAL PLAN SPONSOR PANEL – IMPROVING PLAN OUTCOMES
- "REFLECTIONS IN THE MIRROR" – PARTICIPANT BEHAVIOR STUDY

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

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

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