

2015 SOUTHEAST MICHIGAN

FIDUCIARY SUMMIT

PART OF THE 2015 RETIREMENT PLAN ROADSHOW





Xponential Growth Solutions
 110 WEST C ST. SUITE#2001
 SAN DIEGO, CA 92101

YOU ARE CORDIALLY INVITED TO ATTEND THE 2015 SOUTHEAST MICHIGAN FIDUCIARY SUMMIT

HOSTED BY:
 SHA RETIREMENT GROUP

HOSTED BY:

KELLEY F. SNOOK JR. – AIF SHA RETIREMENT GROUP
DAVID ANDERSON – AIF SHA RETIREMENT GROUP
ELAINE FEATHERSTONE – AIF SHA RETIREMENT GROUP

GUEST SPEAKERS:

JENNIFER M. COON – CPA & SENIOR MANAGER – DKSS
ROBERT CRISAN, VP – KAPNICK INSURANCE GROUP
DIANE GALLAGHER - VP DCIO PRACTICE MANAGEMENT – AMERICAN CENTURY

TOPICS OF DISCUSSION:

- WHAT EVERY FIDUCIARY SHOULD KNOW FOR 2015
- TARGET DATE FUND PANEL – SPEAKERS FROM:
 - AMERICAN FUNDS - BLACKROCK - T. ROWE PRICE
- TARGET DATE FUND SELECTION/ANALYSIS
- ASK THE EXPERT -LOCAL PROFESSIONAL PANEL
- “REFLECTIONS IN THE MIRROR” – WHAT PARTICIPANTS REALLY THINK

COST: WAIVED \$150 REGISTRATION FEE – USE CODE RPRS15

CE CREDIT HOURS: 3 CPE/CPA, 3 HRCI/SPHR, CEBS & CLE ELIGIBLE

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

SECURITIES AND ADVISORY SERVICES OFFERED THROUGH LPL FINANCIAL, A REGISTERED INVESTMENT ADVISOR, MEMBER FINRA/SIPC.

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

CPE Disclosure:
 Xponential Growth Solutions is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Inquiries regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org

MAY 13, 2015
8:00 AM - 11:30 AM

WALSH COLLEGE
3838 LIVERNOIS ROAD
TROY, MI 48083