

2015 SOUTHEAST MICHIGAN FIDUCIARY SUMMIT

PART OF THE 2015 RETIREMENT PLAN ROADSHOW



SHA
RETIREMENT GROUP



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

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

WALSH COLLEGE
3838 LIVERNOIS ROAD
TROY, MI 48083

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

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