

2015 MID-ATLANTIC

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 MID-ATLANTIC FIDUCIARY SUMMIT

HOSTED BY:
RAFFA RETIREMENT SERVICES
& WFG RETIREMENT

HOSTED BY:

ED GIMENEZ, CFP®, AIF® - DIRECTOR OF RETIREMENT PLAN SERVICES —
RAFFA RETIREMENT SERVICES

JOSEPH F. DENOYOR, CFP®, AIF®, CCKP™ - MANAGING PARTNER — WFG RETIREMENT

GUEST SPEAKERS:

JOHN CHOATE - FORMER US NAVY SEAL

DIANE GALLAGHER - VP DCIO PRACTICE MANAGEMENT — AMERICAN CENTURY

HENRY SMITH - ERISA ATTORNEY — SMITH & DOWNEY, P.A.

MATTHEW ROBERTS - EMPLOYEE BENEFIT PLAN ARCHITECT — RAFFA
FINANCIAL SERVICES

TOPICS OF DISCUSSION:

- PAST, PRESENT, & FUTURE OF RETIREMENT PLANS
- FINANCIAL WELLNESS & RETIREMENT READINESS
- TARGET DATE FUND PANEL FEATURING SENIOR PERSONNEL
- ASK THE EXPERTS: LOCAL PROFESSIONAL PANEL
- RFI & RFP BEST PRACTICES
- WHAT EVERY FIDUCIARY NEEDS TO KNOW FOR 2015 & 2016

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

SEPTEMBER 29, 2015

11:00 AM - 3:00 PM

**THE CITY CLUB OF WASHINGTON
555 13TH ST NW
WASHINGTON, DC 20004**

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