

2015 NORTH CAROLINA

FIDUCIARY SUMMIT

PART OF THE 2015 RETIREMENT PLAN ROADSHOW



GORDON ASSET
MANAGEMENT, LLC

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XPONENTIAL GROWTH SOLUTIONS
110 WEST C ST. SUITE#2001
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YOU ARE CORDIALLY INVITED TO ATTEND THE 2015 NORTH CAROLINA FIDUCIARY SUMMIT

HOSTED BY:
GORDON ASSET MANAGEMENT, LLC

HOSTED BY:

JOE GORDON - 401(K) FIDUCIARY & MANAGING PARTNER —
GORDON ASSET MANAGEMENT, LLC (HQ IN DURHAM, NORTH CAROLINA)

GUEST SPEAKERS:

JIM CULBRETH, JR. - PARTNER — SHUMAKER, LOOP & KENDRICK, LLP
JOHN DOYLE - SR VICE PRESIDENT, DEFINED CONTRIBUTION —
AMERICAN FUNDS

TOPICS OF DISCUSSION:

- PAST, PRESENT, & FUTURE OF RETIREMENT PLANS
- PARTICIPANT TRENDS — IMPROVING OUTCOMES BY MEASURING
- TARGET DATE FUND PANEL FEATURING SENIOR PERSONNEL FROM AMERICAN FUNDS, JP MORGAN AND ALLIANZ
- 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

OCTOBER 28, 2015
11:30 AM - 3:00 PM
HOSTED COCKTAIL HOUR 3 PM — 4 PM

SHERATON IMPERIAL CONVENTION CENTER
4700 EMPEROR BLVD
DURHAM, NC 27703

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