



**LUNCHEON SEMINAR**

January 14, 2015  
11:30 AM - 1:00 PM

**New Location:** Cottonwood Grille  
913 W. River Street  
Boise, ID 83702

**President:** Susan Taylor, Milliman  
**President-Elect:** Kelly Belden, Retirement Design Consultants, LLC  
**Program Chair:** Bret Linton, Milliman  
**Membership Chair:** Patrick Courtright, Morgan Stanley  
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# CAPITAL MARKETS UPDATE: 2014 REVIEW

William Campbell, CRPS

Vice President and Corporate Retirement Director, Morgan Stanley

### About Our Topic:

We will review relevant economic and capital market data from a plan sponsor and participant perspective. Included in the review will be 4th quarter 2014 capital market data, as well as helpful longer-term data which will assist in providing perspective on the current capital markets landscape.

### About Our Speaker:

Bill has over 20 years of experience in the qualified plan marketplace and in 2013, was recognized by PLANADVISER magazine as one of the nation’s “Top 100 Retirement Plan Advisers.” Currently he holds the Corporate Retirement Director designation at Morgan Stanley which recognizes Financial Advisors who have dedicated their practice to helping corporate clients manage all aspects of their retirement plans. Over the past two decades, Bill has worked for several well-respected financial services companies including: The New England, ADP Retirement Services, UBS/PaineWebber and Raymond James. Bill and his wife have been married for 20 years and currently reside in Hailey, Idaho with their two young boys. Bill volunteers in the local community as a youth soccer coach and alpine ski racing coach. Bill is a member of Western Pension and Benefits Council (Boise Chapter) as well as the Plan Sponsor Council of America. Bill is Series 7, 6, 24, 26, 63 and 65 Registered.

### **You must register for the Seminar by January 12, 2015**

Register at [www.westernpension.org](http://www.westernpension.org) (select the Boise Chapter)

Or mail this form with a check to:

Melody Evans, WP&BC - Boise Chapter  
PO Box 7186  
Boise, ID 83707

Members Attending: \_\_\_\_\_ MEMBER FEE \$35 per person \*

Non-Members Attending: \_\_\_\_\_ \$60 per person\*

Name(s): \_\_\_\_\_

Company/Organization: \_\_\_\_\_

Email Address(es): \_\_\_\_\_ Phone: \_\_\_\_\_

**Lunch:** There will be three menu items to choose from.

\*All cancellations must be received at least 3 days prior to the event. If a cancellation is timely received, the attendee will receive a refund, less a \$10 processing fee. If a cancellation is received less than 3 days prior, the attendee will not receive any refund.