



LUNCHEON SEMINAR

October 22, 2014
11:30 AM - 1:00 PM

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

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Managing Fiduciary Risk for Plan Sponsors

Erik Woodin ChFC, APR
Regional Sales Director, Great-West Financial

About Our Topic:

This presentation is designed to provide you with an overview of some of the fiduciary risk areas that are uniquely relevant to you as plan sponsors and financial advisors of 401(k) plans, as well as to provide you with some practical suggestions that will help you manage your risk. We take a look at the fiduciary responsibilities you need to be aware of if you are or think you might be a fiduciary. We will cover the definition of an ERISA fiduciary, the standards of conduct that fiduciaries are subject to, and the consequences for breaching fiduciary duties. Lastly, we will discuss some risk areas for plan sponsors in today's 401(k) marketplace, and most importantly, we will identify some practical steps that you can take to help you manage your risk.

About Our Speaker:

Erik joined forces with Great-West Financial in 2005 and is currently a regional sales director covering Montana, Idaho, and Utah. His primary focus is to partner with advisors, TPAs, RIAs and other distribution sources to help them succeed and grow their retirement practices. Erik combines his extensive industry knowledge and experience with Great-West Financial's flexible and competitively priced product suite to create compelling solutions that win in the marketplace. Erik has been in the retirement industry for over 10 years. At Great-West Financial he has been a consistent award winner and qualifier, earning the Managed Accounts Award in 2008, winning RSD of the year in 2011, and qualifying for the President's Club for the last six years.

In the cold Montana winters, Erik enjoys skiing and playing hockey. In warmer weather, he likes to hit the links for a round of golf or pursue his dream of climbing all 54 of Colorado's 14,000-foot mountain peaks (Fourteeners). And when he needs to simply relax after all of that, Erik enjoys spending down time with his wife and three children.

You must register for the Seminar by October 17, 2014

Register at 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.