

SESSION

April 26, 2018
11:00am – 12:00pm



President: Kelly Belden, Empower Retirement
Program Chair: Bret Linton, Milliman
Membership Chair: Diane Kaiser, PERSI
Secretary: Sarah Murray, Milliman
Treasurer: Patricia Schirmer, Harris & Co CPAs
At Large Board Members: Patrick Courtright, Raymond James; Duane Mayer, Retired

Harris CPAs

805 West Idaho Street, 4th Floor
Boise, ID 83702

****PLEASE NOTE THE NEW LOCATION****

Retirement Plan Policy Statements

An in-depth look at the role of written policy statements in carrying out Fiduciary Best Practices
Stuart Hack

Join us for another webinar from the WPBC. Lunch will be ordered and, as a group, we will have the opportunity to discuss any questions amongst ourselves. In addition, we have negotiated a discounted rate of \$25 (instead of \$35), if attending as a group at the Harris CPAs location.

Registration for the event closes on Monday, April 23, 2018

Register at www.wpbcboise.org

About Our Speaker:

Stuart Hack, CLU, JD is a Partner with Sunlin Consulting LLC and Vice President of Sunlin Consulting Investment Advisory Services LLC. He advises qualified plan sponsors and record keepers on **fiduciary liability exposure management**. He designs, implements and monitors fiduciary best-practices programs, including **fully documented ERISA 404(a)(5), 404(c) and 408(b)(2) compliance solutions**. Stuart also designs and manages **ERISA 3(38) fiduciary solutions** that record keepers offer to **participant-directed defined contribution plan sponsors and financial advisors**. His experience includes over 30 years as CEO of a benefits consulting and registered investment advisory firm and the co-founder of a daily record keeping service provider. He currently serves on the Board and was past President of the Orange County chapter of the Western Pension & Benefits Council. Past Vice President of ASPPA, Past Chair of ASPPA’s National Retirement Income Policy Papers Committee.

The webinar will provide one continuing education credit for ASPPA, NIPA, CEBS, JBEA, ERPA, MCLE CA, CPA CE for CA; AIF and CFP pending.

You may also mail this registration form and payment to Patricia Schirmer, WP&BC, 2289 S Bonito Way, Meridian ID 83642

Members Attending: _____ @ \$25 per person*
Non-Members Attending: _____ @ \$40 per person*
Name(s): _____
Company/Organization: _____
Email : _____ Phone: _____

Lunch will be served.

*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.