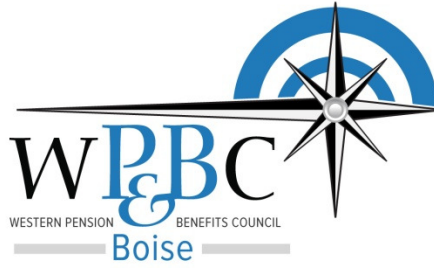


**SESSION**

August 18, 2016  
3:00 pm - 4:30 pm  
Zions Bank – Business Resource Center  
800 W. Main Street, Suite 600  
Boise ID 83702

*Please note new time and location*



President: Kelly Belden, Empower Retirement  
Past President: Susan Taylor, Milliman  
Program Chair: Bret Linton, Milliman  
Membership Chair: Patrick Courtright, Morgan Stanley  
Secretary: Diane Kaiser, PERSI  
Treasurer: Jodi Daugherty, Eide Bailly  
At Large Board Member: Scott Townsend, Idaho Power

## *Roles and Responsibilities in Retirement Plans*

Please join us for an interactive discussion on the roles and fiduciary responsibilities from the varying professional perspectives of our panel.

Appetizers will be served.

Registration for the event closes on Monday, August 15, 2016

Register at [www.wpbcboise.org](http://www.wpbcboise.org)

### **About Our Speakers:**

**Bret Busacker** is an ERISA attorney and Partner with Holland & Hart in Boise. Bret counsels with HR executives and compensation and benefits committees on benefit plan design considerations, plan administration, compliance issues, and fiduciary and governance matters. He is a member of the Idaho and Ohio bars.

**Jennifer Schuessler** is a Regional Sales Director for Empower Retirement responsible for marketing corporate retirement plan services to plan sponsors in the Pacific Northwest. Jennifer has also served as a Communications Program Manager, Communication Strategist and Financial Education Consultant. She holds her CFP designation and maintains FINRA Series 6, 63, and 65 securities registrations.

**Kimberly Vo** is a Total Rewards Administrator for the J.R. Simplot Company supporting compliance, administration and communication of Simplot's retirement and health and welfare plans. Kimberly holds the Accredited Pension Administration certification from the National Institute of Pension Administrators.

**Christina Zwainz** is a CPA audit manager with Eide Bailly. Christina works with Defined Benefit, Defined Contribution, 403b and ESOP plans and trains auditors on reviewing and auditing employee benefit plans.

**Lily Woolsey** is a Retirement Benefits Analyst at AmeriBen/IEC Group working towards her Qualified 401(k) designation through ASPPA. Lily is responsible for overseeing the administration of 70 retirement plans.

**Kelly Wood** is a Financial Advisor and founder of Wood Financial Group. Kelly previously was a business owner, and a Finance/Engineer Executive at Boeing, Oracle and Hewlett Packard and is an Accredited Asset Management Specialist.

You may also mail this registration form and payment to Jodi Daugherty, WP&BC, 877 W. Main St., Ste. 800 Boise, ID 83702

Members Attending: \_\_\_\_\_ @ \$25 per person\*  
Non-Members Attending: \_\_\_\_\_ @ \$45 per person\*  
Name(s): \_\_\_\_\_  
Company/Organization: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_

\*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.