

SESSION

October 20, 2016
11:30 am – 1:00 pm
Eide Bailly
877 W. Main Street, Suite 800
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

Defined Contribution Compliance Reboot

Robert Griffith – Milliman

In this session, Robert will discuss recent issues with Defined Contributions plans. Come learn what recent compliance issues may have slipped through the cracks and items that may be forthcoming.

Lunch will be served.

Registration for the event closes on Tuesday, October 18, 2016

Register at www.wpbchoise.org

About Our Speaker:

Robert Griffith is a Senior Benefits Consultant at Milliman, he has been with Milliman since 2004. Robert works on technically complex defined contribution retirement plans, including plans that offer unitized funds and self-directed brokerage accounts. He is also responsible for overall plan administration and daily operations for his clients' plans, in addition to providing trust and audit assistance, and participant and plan-level reporting.

Originally from the Phoenix, AZ area. He graduated with a degree in Finance from Arizona State University College of Business (ASU). He is currently a member of the American Society of Pension Professional and Actuaries (ASPPA) and holds the designation of Certified Pension Consultant (CPC). After graduating from ASU, he worked for several years with a national trust company that specialized in daily valued retirement plans. After that he moved with his family to the Seattle area. He enjoys spending time with his family. Especially attending his children's sporting events. He is also active with Little League as an umpire, and a Boy Scout merit badge councilor.

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: _____

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.