



Northern California Chapter of ISCEBS

Good for Your Employer.
Good for the Industry.
Better for You!



401k/403b Retirement Boot Camp **Wednesday, August 16, 2017** **(You may attend in-person or via webinar)**

DATE:

August 16, 2017 (Wednesday)

TIME:

8:00 am - 2:00 pm

LOCATION:



**AMERICAN
FUNDS®**

From Capital Group

1 Market Street
Steuart Tower, 20th Floor
San Francisco, CA 94105

COST:

\$40 Members

\$75 Nonmembers/Guests

(Includes breakfast and lunch, sponsored by Pamela Gillett, American Funds.)

AGENDA:

8:00 - 8:30 am

Check-In and Breakfast

8:30 - 8:40 am

Introductions and kick off, Northern California ISCEBS President, Candice Jones, CEBS, Mercer

8:40 - 9:30 am

ERISA & Plan Design Basics for 401k & 403b

Leonard Roberts, Nicholas Pension Consultants

9:40 - 10:30 am

Audits and Top Mistakes

Crystal Ekanyake, CEBS, Audit Partner, Clifton Larson Allen

10:40 - 11:30 am

Today's Newest 401k Features & Services

Octavio Cheung, Empower

11:30 am - 12:00 noon

Lunch & Networking

12:00 noon - 1:00 pm

DC Investment Perspectives: Simplify Fund Menus to Help Meet Participant Objectives

Toni Brown, CFA, Senior Vice President, American Funds (part of Capital Group)

1:10 - 2:00 pm

Special Bonus Topic

The New Fiduciary Rule and Related Plan Fees

Rick Ferguson, CEBS, Client Executive, March & McLennan Agency LLC

REGISTRATION:

Please [click here](#) to visit the Northern California Chapter website for more information and [registration](#).

(Speakers listed on next page)

SPEAKERS:

Leonard Roberts
Nicholas Pension Consultants



NICHOLAS PENSION CONSULTANTS
Plan Design & Administration

Crystal Ekanvake, CEBS
Audit Partner
CliftonLarsonAllen



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Octavio Cheung
Empower



Toni Brown, CFA
Capital Group



**CAPITAL
GROUP™**

Rick Ferguson, CEBS
Client Executive
Marsh & McLennan Agency LLC



**MARSH & MCLENNAN
AGENCY**
Retirement Services



Educational sessions at this program will qualify for up to five (5) CEBS continuing professional education (CPE) credits. Visit www.cebscpe.org for more information.