



401(k) - Fiduciary Landmines, Investment Policy Statements and Financial Education June 13, 2019

(Available In-Person or via Webinar)

Please join the DFW chapter of ISCEBS on Thursday, June 13th for "401(k) - Fiduciary Landmines, Investment Policy Statements and Financial Education" at Maggiano's and via webinar.

Our speaker, Brandon Day, Senior Advisor with 360 Wealth Management, will discuss:

- The Fiduciary Landmine: Difference between the antiquated broker style and if you have a co-fiduciary via 321 or 338 relationship.
- The Truth & Myth over the Investment Policy Statement.
- Adoption and further appreciation through hands-on financial education and annual education workshops.

DATE: Thursday, June 13, 2019

TIME: 11:30 am - 1:00 pm

LOCATION: Maggiano's Little Italy
205 Northpark Center
Dallas, TX 75225

COST: **\$25** - Chapter Members
\$25 - DAHU Members
\$35 - Nonmembers
\$10 - Webinar

(Access instructions will be emailed by June 11th, if you have not received the instructions by then, please email dfwiscebs@outlook.com)

REGISTRATION: Please [click here](#) to register.

RSVP: By Tuesday, June 11, 2019.

QUESTIONS: dfwiscebs@outlook.com

SPEAKER

Brandon Day
Senior Advisor, 360 Wealth Management

In addition to ongoing management of existing clients, Brandon works with Financial Advisors to help grow their practice by expanding their knowledge on various investment reporting and trading platforms, financial planning software, and other ways to improve and streamline their process.



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