



Twin Cities Chapter of ISCEBS Ethics Seminar

"Trust and Behavioral Finance: Ethical Habits to Reinforce Trust in Business Relationships"
Speaker: Rick Storms, CEBS - Client Services Manager, Alerus

You asked for it - we're delivering it!

Many of our members and friends of the Chapter are required to have ongoing Ethics Training in order to meet their Continuing Education licensing requirements. We are happy to announce that our Chapter is sponsoring this half-day event to help you fulfill this requirement in one sitting.

Our long-time Chapter member and former President, Rick Storms, will lead this session. As you may know, Rick is a seasoned presenter for both our Chapter events and at the annual ISCEBS Symposiums. In fact, this material on Ethics was so well received at past Symposiums that Rick has been asked to conduct these sessions for three consecutive years. Rick makes these sessions both educational and enjoyable.

Our topics and takeaways from the morning will include:

Definitions of Ethics and Trust - Why Ethics Matter

- Facing complicated ethical issues every day
 - Regulatory requirements
 - DOL's scope of fiduciary liability
 - "It's good for business"

Research on Ethics and Trust

- Results of multiple studies
- How organizations can improve
- Ethical companies have positive business results at multiple levels

Behavioral Finance Perspective

- What is it?
- Subscription bias, choice overload, loss aversion and confirmation bias
- Examples from retirement planning, health insurance and wellness

Small Group Discussions

- Sample situations - quizzes and case studies

What Ethical Habits Can We Embrace as Industry Professionals?

- Ethics can be taught, developed, and used to build trust
 - Importance of a Code of Conduct
- Managing Ethical Dilemmas and Best Practices

The Chapter has applied for and received approval for 3 hours of Continuing Education Credit from the state of Minnesota.

Feel free to invite colleagues that need their Ethics Continuing Education credits even if they do not regularly attend CEBS events.

WHEN

Thursday, June 20, 2019

7:45am - 8:15am (Check-In and Breakfast/Coffee)

8:15am - 9:45am (Educational Session #1)

9:45am - 10:00am (Break)

10:00am - 11:30am (Educational Session #2)

WHERE

The Christensen Group
9855 West 78th Street
Eden Prairie, MN 55344

FEE

Current TCISCEBS Chapter Members - \$75

Non-Members - \$100

REGISTRATION DEADLINE

Monday, June 17, 2019

Please respond by clicking one of the buttons below

YES

NO