

Characteristics of a Successful Retirement Plan

Compare your retirement plan! At this interactive benchmarking seminar, find out how well your plan stacks up!

Jim Sampson of Cornerstone Retirement Advisors will highlight the characteristics of a successful retirement plan, and provide you with the tools for tackling your retirement plan and staying ahead of the competition. Mr. Sampson will discuss the key components of a high-quality retirement program, the importance of participant education, top fiduciary compliance issues and more.

Pete Barron from AllianceBernstein Investments will then invite attendees to show how well their plans deliver on these and other plan goals compared to the offerings of their peers in attendance. Through the use of a handheld device, attendees will enter their responses to survey questions throughout the presentation and all results will be displayed LIVE! Attendees will leave with a baseline for how their plan competes and will receive a followup customized report designed to enhance their company's unique retirement program.

Speaker: James F. Sampson, AIF®, Managing Principal, Cornerstone Retirement Advisors, LLC

Jim Sampson has been in the retirement plan industry for more than 13 years, advising corporate clients on 401(k), 403(b), profit-sharing, defined benefit and deferred compensation plans.

In 2008, Mr. Sampson was selected as one of five national finalists for *PLANSPONSOR Magazine's* Retirement Plan Adviser of the Year award, and was named a *Benefits Power Broker™* by *Risk & Insurance®* and *Human Resource Executive®* magazines. He has also appeared on the *FOX25 Morning News* in Boston on its weekly "Manage Your Money" segment. Mr. Sampson recently was nominated to 401kWire's 2009 List of Most Influential Advisors in Defined Contribution.

Mr. Sampson has earned the ACCREDITED INVESTMENT FIDUCIARY™ professional designation and has completed The 401k Coach® Program. He earned a bachelor of science degree in sports management from the University of Massachusetts, Amherst.

Speaker: Peter Barron, Vice President, Retirement Client Service Manager, AllianceBernstein

Peter Barron is a vice president within the Defined Contribution Division of AllianceBernstein, responsible for the management of the Client Service Officer and Client Service Associate Teams. Mr. Barron joined AllianceBernstein in January 2006 as vice president within the Strategic Service and Sales Division, responsible for the management of the retirement specialist sales desk. Prior to joining AllianceBernstein in 2006, he held several positions at New York Life Investment Management over the course of nine years, including retirement desk sales manager, retirement new business consultant, and regional sales vice president of the New England region. Mr. Barron graduated from the University of New Hampshire with a bachelor's degree in communications and business administration. He currently has his NASD Series 6, 63 and 26 licenses as well as his life and health insurance licenses, and holds the Accredited Retirement Plan Consultant designation of the Society of Professional Administrators and Recordkeepers.

Dates

December 10, 2009 (Thursday)

Time

8:45-9:00 a.m.—Registration and Breakfast

9:00 a.m.—Greater Boston Chapter Annual Meeting

9:15-11:00 a.m.—Program

Location

TIAA-CREF

One Beacon Street, 8th Floor
Boston, MA 02108
(800) 842-2004

Directions

Public transportation is easiest. The One Beacon Street building is closest to the following T stops: Red Line—Park Street; Orange Line—State Street; Green Line—Government Center.

Additional details, including parking, can be accessed at www.1beaconst.com/directions.html.

Cost

Free—Members
\$25—Nonmembers/Guests
Checks via PayPal at www.iscebs.org/greaterbostonchapter

R.S.V.P.

By Tuesday, December 1, 2009

Jay Cobak
Phone: (617) 788-5922
Fax: (617) 227-4171
jcobak@tiaa-cref.org

Register by Mail

Make check payable to:
Greater Boston Chapter—
ISCEBS

Attn: Jay Cobak
TIAA-CREF
One Beacon Street, 8th Floor
Boston, MA 02108

2.5 hours of CE credit in
human resources applied
for—notification pending

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Payment—

Checks via PayPal at www.iscebs.org/greaterbostonchapter
OR

Make check payable and mail to:
Greater Boston Chapter—ISCEBS

Attn: Jay Cobak
TIAA-CREF
One Beacon Street, 8th Floor
Boston, MA 02108

R.S.V.P. by December 1, 2009

Registration Form

Feel free to share this announcement with others interested in benefits.
PLEASE PRINT.



Greater
Boston
Chapter

Full Name (first, middle, last)

Company

Address

City/State/ZIP

Telephone

Fax

E-Mail

Amount enclosed: \$25 Nonmember/Guest
American citizen? Yes No

