

# How's Your 401(k) Doing?

Times have been challenging recently for 401(k) plan sponsors and participants. Market losses, legislative initiatives and the changing landscape of retirement benefits are causing many of us to reevaluate our retirement strategies (both for our companies and personally). Join us for an interactive discussion of retirement plan trends, new regulations and financial planning considerations to get your 401(k) plan into shape.

## Speakers

### Joe Steen, CEBS, ChFC, Vice President, Aon Consulting

Mr. Steen is a member of Aon Consulting's Retirement Practice and National Defined Contribution Leadership Group. He has 20 years of employee benefits experience and has spent the past 11 years providing fiduciary governance, administration and compliance consulting services to Aon's clients, focusing on 401(k), 403(b) and 457 plans. Mr. Steen has earned the designations of certified employee benefit specialist (CEBS) and chartered financial consultant (ChFC) and is a registered representative of the financial industry regulatory authority. He is a board member of the Tampa Bay Area Chapter of the International Society of Certified Employee Benefit Specialists, a past president of the South Florida Compensation and Benefits Association, and has chaired numerous Aon task forces. Mr. Steen has spoken at numerous industry events, conferences and seminars.

### Sherri Ferguson, CEBS, CFP, AWMA, Financial Services Representative, Principal Financial Group

Ms. Ferguson has over 25 years of experience in the financial services industry. She has earned the designations of certified employee benefit specialist (CEBS) and accredited wealth management advisor (AWMA). Ms. Ferguson has also earned her certified financial planner (CFP) certification. She has provided financial plans to individuals and has worked with business owners and corporate executives to help design tax-advantaged retirement benefits. Ms. Ferguson is a member of the Financial Planning Association of Tampa Bay, the Tampa Bay Area Chapter of the International Society of Certified Employee Benefit Specialists, the HR Tampa Chapter of the Society for Human Resource Management, and the Society of Human Resource Management. She is also a member of the Westshore Alliance, the New Tampa Evening Rotary Club, University of South Florida Alumni Association, and is a volunteer for Real Estate Lives. Ms. Ferguson is a former board member of Florida's Pre-Paid College Tuition Plan.

## Date

March 23, 2010 (Tuesday)

## Time

7:30-8:00 a.m.—Registration and Continental Breakfast  
8:00 to 9:30 a.m.—Program  
9:30 to 9:45 a.m.—Q&A/Adjournment

## Location

**The Centre Club**  
123 South Westshore Blvd.  
Tampa, Florida  
(813) 286-4040  
Parking available in the Intercontinental Hotel garage

## R.S.V.P.

Thursday, March 18, 2010

Register online at [www.tampaiscebs.org](http://www.tampaiscebs.org) or mail in the registration form.

## Cost

\$25—Members  
\$35—Nonmembers/Guests  
*No refunds on cancellations within three business days of program.*

## Credit Card Payment

We accept credit card payment when registering online at [www.tampaiscebs.org](http://www.tampaiscebs.org).

## Register Online

[www.tampaiscebs.org](http://www.tampaiscebs.org).

## Register by Mail

**Make check payable and mail to: Tampa Bay ISCEBS**  
P.O. Box 1384  
Safety Harbor, FL 34695

## Questions

**Joe Steen, CEBS**  
Phone: (813) 636-3119  
Fax: (813) 636-3010  
[joe\\_steen@aon.com](mailto:joe_steen@aon.com)

Tax ID #59-3205131

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Safety Harbor, FL 34695

**R.S.V.P. by March 18, 2010**

## Registration Form

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



**Tampa Bay Area Chapter**

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Name

\_\_\_\_\_  
Company

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/ZIP

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
E-Mail

Amount enclosed:  \$25 Member  
 \$35 Nonmember/Guest

