April 28, 2021

WEBINAR: Fiduciary Risk Mitigation & Cost Saving Opportunities for Retirement Plans

Join the Detroit Chapter and 401(k) expert Mitch Milless on April 28th at 12:00 pm, to learn how to greatly reduce your fiduciary liability related to the retirement plans sponsored by your company, and how you can take advantage of the unprecedented opportunity to make your plans more competitive and cost efficient by reviewing:

- Guidance on Fiduciary Best Practices
- Insight into how to ensure you have the right fiduciary liability insurance for your company
- Industry update on record consolidation and fee competition
- Best practices on Financial Wellbeing

Each registrant will receive an Uber Eats Voucher worth $25.00 the morning of the event. Please purchase your lunch on us to enjoy during the education event!

Uber Eats

DATE: Wednesday, March 28, 2021

TIME: 12:00 - 1:00 pm Eastern

LOCATION:

COST: **NO CHARGE!**

ZOOM LINK: **Click here** to register via Zoom.

QUESTIONS: Please email detroit_iscebs@um.att.com or call (248) 457-8032 and leave a message.

CEBS COMPLIANCE APPROVED

This webinar qualifies for one (1) CEBS Compliance credit.
Visit www.cebs.org/compliance for more information.

SPEAKER

Mitch Milless, Senior Vice President of Retirement Services, Financial Services - Upper Midwest, Marsh & McLennan Agency LLC

Expertise: Investment advisory services, relationship management, retirement plan consulting.

Overall experience with employer-sponsored retirement plans: Mitch has 12 years of industry experience.

Education, honors, designations and other credentials:

- Recognized as a top 100 Retirement Plan Advisor by Financial Times
- Recognized as a top 40 under 40 401(k) Advisor by NAPA
  - University of St. Thomas, Bachelor's Degree in Philosophy, Catholic Studies, Business
  - Series 6, Series 63 licensed and registered representative

Roles and Responsibilities: Due to his position with the firm, Mitch oversees every client relationship.

Mitch is responsible for the marketing, sales, and fiduciary advisement of 401(k), 403(b), and other qualified plan services. He helps clients and prospects identify and achieve the goals of their retirement plans within the allotted amount of time and resources of each company. Mitch is a self-proclaimed retirement plan nerd and has 12 years of experience working with businesses and their financial planning.