

DEFERRED COMPENSATION PLAN BOARD REPORT 12-29

Date: May 2, 2012
To: Board of Deferred Compensation Administration
From: Staff
Subject: 2012 NAGDCA Conference & Buck Consultants Seminar

Members
Eugene K. Canzano, Chairperson
John R. Mumma, Vice-Chairperson
Michael Amerian
Sangeeta Bhatia
Cliff Cannon
Tom Moutes
William Raggio
Robert Schoonover
Margaret Whelan

Recommendation:

That the Board of Deferred Compensation Administration (a) approve the necessary funding for available Board members and professional staff to attend the 2012 NAGDCA conference in San Diego, CA; and (b) receive and file information regarding an upcoming seminar offered by Buck Consultants.

Discussion:

I. NAGDCA CONFERENCE

The National Association of Government Defined Contribution Administrators (NAGDCA) is an organization consisting of government and industrial members pursuing legislative enhancements to defined contribution plans and providing educational benefits to its membership. The organization's 2012 conference is being held in San Diego, California September 29–October 3. The annual conference is focused on issues affecting state and local government administrators of primarily Section 457 defined contribution plans. The conference generally includes sessions reviewing federal legislative developments, current trends on plan design and administration, and education on plan fundamentals.

A preliminary conference schedule is attached. Board members should indicate to staff as soon as possible whether it is or is not their intention to attend. The registration deadline is August 20, 2012. Staff will make all registration arrangements. In addition, staff has reserved rooms in advance for each potential attendee. Confirmation numbers can be provided to those attending.

Costing & Attendance – Staff recommends that attendance be limited to available Board members and available Personnel Department/City Attorney professional staff. Following is an estimate of conference and pre-conference costs per attendee.

Estimated Expenses Per Attendee		Amount
4-Night Stay @ \$217 per night w/18.25% tax)	\$	1,026
Registration	\$	550
Transportation (Estimated)	\$	218
Miscellaneous (Per Diems, etc.)	\$	225
Per Attendee Total-->	\$	2,019
Maximum Board Members Attending		9
Maximum Staff Members Attending		6
Maximum Total Conference Cost	\$	30,291

In addition, there are four pre-conference training sessions which this year are being offered at per-session costs ranging from \$50 to \$85 to \$110 per session (in prior years a flat fee would cover all pre-conference events). Given this more expensive pricing model, and given that attending these sessions would require an additional 1-2 nights at the conference hotel, staff recommends that the Board not approve funding for any pre-conference sessions/travel costs.

Because the conference is in San Diego, travel by rail or car may be comparable to or more advantageous than travel by air. Round-trip travel on Amtrak is approximately \$72, and with an additional \$10 per day for parking at Union Station plus \$20-30 in round trip cab fare, the total cost is approximately \$140. Travel by car (using the City's current mileage reimbursement rate of 55.5¢ per mile) equates to approximately \$130 round trip, but after including overnight vehicle hotel parking fees of \$22 per night, the total cost equals \$217. Current round-trip airfares from Los Angeles to San Diego are minimally \$250.

The relative costs of traveling for these three options may change between now and the conference. Attendees should be aware that Controller's guidelines state that "the allowable cost shall be the actual cost of the alternate mode of transportation or the cost allowable under a regularly scheduled airline, whichever is less." In this case, at present prices, **the allowable cost would be the cost of traveling by rail**. Also, it should be noted that satisfactory proof of insurance is required to use a private vehicle.

The Controller's Office recently revised its guidelines to allow travelers to make their own air reservations without using the City Travel Store. However, no attendees should make an air reservation or incur any other conference-related expense until after final approval to attend the conference has been provided by the Mayor's Office and communicated by staff. Further, if making reservations independently, it is important to document the lowest available non-stop fares at time of purchase. This can be done by printing out pages from an airfare shopping service such as Expedia. The City will not provide reimbursement for these purchases until attendees return from the conference. Questions regarding making these reservations should be directed to staff. Alternatively, attendees are welcome to continue to use the City's TravelStore service.

Staff Resources – Staff member Esther Chang will coordinate all matters regarding attending the conference this year. In addition, as always, staff will follow up with each Board member to confirm attendance and track related details.

II. BUCK CONSULTANTS SEMINAR

The Board's recently approved communications consulting services contractor, Buck Consultants, is offering a seminar regarding defined contribution plan management (see attachment). This seminar is open to any interested Board or staff member. There is no cost to attend the event, which will be held at the Omni Hotel on 251 South Olive Street from 8:30 – 10:00 a.m. on Tuesday, June 5, 2012.

Board members interested in attending should notify staff by May 15, 2012, so that a final list can be provided to Buck. Please note that because this is a local event, staff is not anticipating any reimbursable expenses related to attending. Also note that should an attendee consume any meals or take any materials as part of attending this event, those may be reportable gifts under State ethics disclosure requirements.

Submitted by: _____
Steven Montagna

Approved by: _____
Alejandrina Basquez

Agenda

All meetings and events will be held at the Sheraton San Diego Hotel & Marina unless otherwise indicated.

Conference registration fees cover all conference activities except those that are sponsored. All sponsored activities are identified as such in the conference materials. A cost breakdown will be provided for each sponsored event in the conference binder provided on site and on the NAGDCA website.

Please be aware, if you are seeking CFP or CPE continuing education credits, you must sign-in and sign-out of each session. Sign-up sheets will be available outside of each session.

Located in the Sheraton San Diego Hotel & Marina (unless otherwise noted on agenda):

- NAGDCA Conference Registration
- ANC Foundation Raffle
- InFRE Booth
- IRS Outreach/Communications Booth
- 1k/5k Walk/Run Information Table
- National Save for Retirement Week Display Table
- Refreshments/Breakfasts/Coffee Breaks
- San Diego Concierge Table (CVB) – Sunday thru Tuesday
- Louisville Information Table (CVB) – Wednesday only

Saturday, September 29

8:30 a.m. – 11:00 a.m. **NAGDCA Executive Board Meeting**

11:00 a.m. – 12:00 p.m. **ANC Foundation Board Meeting**

12:00 p.m. – 5:00 p.m. **Fun Run/Walk Information Table** *Sponsored by T. Rowe Price*

12:00 p.m. – 5:00 p.m. **Registration/ANC Foundation Silent Auction**

1:00 p.m. – 3:00 p.m. **An InFRE Course on Ethics – Level II** *(Sign-up Required/Additional Fees Apply)*

Knowing the ethical thing to do and actually doing it can be difficult at times. This advanced ethics course provides practical examples that help bridge the gap between knowing the InFRE Code of Ethics and doing the right thing when faced with an ethical dilemma.

A brief review of the InFRE Code of Ethics will be followed by examples, case studies and discussion to explore the practical side of ethical decision making. This course fulfills the 2 hour continuing education requirement for renewing the Certified

Retirement Counselor® (CRC®) certification and Certified Retirement Administrator (CRA) designation.

Presenter: Mary Willett, CRA, CRC®

1:00 p.m. – 4:30 p.m. **Community Service Project** (Sign-up Required)

Sponsored by Nationwide Retirement Solutions

Sunday, September 30

7:45 a.m. – 5:30 p.m. **Registration/ANC Foundation Silent Auction**

8:00 a.m. – 5:00 p.m. **Fun Run/Walk Information Table** *Sponsored by T. Rowe Price*

8:00 a.m. – 12:30 p.m. **Cyber Café and Charging Station** *Sponsored by Fidelity Investments*

8:00 a.m. – 12:30 p.m. **San Diego Convention and Visitors Bureau Information Table**

8:00 a.m. – 12:00 p.m. **InFRE Pre-Conference Workshop – Fundamentals of Plan Design**

(Sign-up Required/Additional Fees Apply)

Course #1 of the InFRE® Retirement Plan Administrator Series

designed especially for NAGDCA.

As a retirement plan administrator, or board or committee member responsible for a retirement benefit program, you need to understand the basic features of the various plans and how they can, or cannot, meet the needs of employers and employees.

In this session you will learn:

- the history of retirement plans and the Social Security system
- the background as to how defined benefit and defined contribution plans were first used and how they have changed
- about the different types of employer-sponsored retirement plans most commonly used in the U.S. today, with an emphasis on those in the public sector
- common trends within the retirement industry and how they can impact plan administration.

Perfect for those with new to intermediate level skills, this is the first course in the four-part series designed specifically for public defined contribution administrators.

Presenter: Mary Willett, CRA, CRC®

Attendees earn 4 InFRE CE Credits

8:00 a.m. – 12:00 p.m. **403(b) Pre-Conference Workshop** *(Sign-up Required/Additional Fees Apply)*

This session is geared toward 403(b) plan sponsors and will include two panel discussions. Panel 1 will focus on Fiduciary Issues and Vendor Relations and Panel 2 will focus on Selection of TPAs/Review of TPA Functions and Changing Service Providers.

12:15 p.m. – 4:00 p.m. **Social Event** (Sign-up Required) *Sponsored by Prudential Retirement*

4:30 p.m. – 5:00 p.m. **NAGDCA: An Environment for Learning**

(Recommended for new members and first time attendees)

This session will help you get the most out of the 2012 conference and show how NAGDCA can help you throughout the year. The session will include an overview of the organization and its leadership, its evolution and growth, the services it offers members, and current special projects. It will include an overview of the conference schedule, “first-timer tips,” and more; it is particularly important for first-time delegates and newcomers to the industry.

Featured Speakers: Julia Durand, CalSTRS, NAGDCA President; Tara Hagan, State of Nevada, NAGDCA Member-at-Large; Alex Hannah, ICMA-RC, NAGDCA Industry Vice President

5:00 p.m. – 5:30 p.m. **Student Orientation** (Students and designated NAGDCA members only)

NAGDCA has again invited university students interested in defined contribution to participate in the annual conference. This conference session will help orient the student attendees, and give them an opportunity to meet with their paired NAGDCA mentor for the conference. This session will also include an overview of the organization, its evolution and growth, the services it offers members, an overview of the conference schedule, and tips for students to get the most out of the conference experience.

5:30 p.m. – 6:00 p.m. **Student/Mentor Reception** (Students, mentors, financial planning program directors, and Board members) *Sponsored by InFRE*

6:00 p.m. – 7:30 p.m. **President's Reception** *Sponsored by Nationwide Retirement Solutions*

Monday, October 1

6:00 a.m. **1 & 5k Fun Run/Walk Participants Meet**

6:15 a.m. **1 & 5k Fun Run/Walk** *Sponsored by T. Rowe Price*

8:00 a.m. – 3:30 p.m. **Registration/ANC Foundation Silent Auction**

8:00 a.m. – 4:00 p.m. **Cyber Café and Charging Station** *Sponsored by Fidelity Investments*

8:00 a.m. – 4:00 p.m. **San Diego CVB Information Table**

8:00 a.m. – 9:00 a.m. **Breakfast Buffet**

9:00 a.m. – 9:45 a.m. **Conference Opening and Welcome**

9:45 a.m. – 10:45 a.m. **General Session** *Keynote Speaker: Mellody Hobson, President, Ariel Investments*

10:45 a.m. – 11:00 a.m. **Coffee Break** *Sponsored by Wellington Management Company*

11:00 a.m. – 12:00 p.m. **General Session: The Washington Report: Retirement Security and Individual Responsibility**

All eyes seem to be watching Washington as it debates the federal budget, tax reform, deficit reduction, and the debt limit. The Washington Report session will provide up-to-date information on those activities and how they could impact the administration of public employer defined contribution plans. Tax reform proposals have included defined contribution and pension simplification issues. The panelists will review the topics that have been discussed by policy makers who are contemplating changes to defined contribution plans.

Moderator: Gay Lynn Bath, State of Oregon, NAGDCA Past President and Legislative Committee Chair

Speaker: Susan White, Susan J. White & Associates, NAGDCA Legislative Counsel

12:00 p.m. – 1:15 p.m. **Opening Luncheon** *Sponsored by ING*

1:15 p.m. – 1:30 p.m. **Break**

1:30 p.m. – 3:00 p.m. **“Breakout Sessions” – Government Member Sessions**

(Government members and students only)

Session #1: \$100 million or less

Session #2: \$101 million - \$250 million

Session #3: \$251 million - \$499 million

Session #4: \$500 million - \$999 million

Session #5: \$1 billion or more

1:30 p.m. – 2:30 p.m. **Industry Member Annual Meeting** (Industry members and students only)

3:00 p.m. – 4:30 p.m. **Leadership Recognition Award Winner Photos**

6:00 p.m. – 7:30 p.m. **Reception** *Sponsored by Great-West Retirement Services*

Tuesday, October 2

8:00 a.m. – 9:00 a.m. **Breakfast Buffet**

8:00 a.m. – 1:00 p.m. **Registration/ANC Foundation Silent Auction**

8:00 a.m. – 1:00 p.m. **San Diego CVB Information Table**

8:00 a.m. – 1:00 p.m. **Cyber Café and Charging Station** *Sponsored by Fidelity Investments*

9:00 a.m. – 10:00 a.m. **General Session: IRS/Regulatory Update – Activities and Regulations**

An IRS representative and others will discuss recently issued (or soon to be released) regulations pertaining to defined contribution plans.

Moderator: Ralph Marsh, City of Houston, TX

Featured Speakers: Marilyn Collister, Great-West Retirement Services; Cheryl Press, IRS

10:00 a.m. – 10:15 a.m. **Coffee Break** *Sponsored by BlackRock*

10:15 a.m. – 11:30 a.m. **Concurrent Sessions Divided by Track A & B** (See Below)

TRACK A - NEW MEMBERS - DEFERRED COMPENSATION BASICS (Less than 5 years in the industry)

Session 1: **DC 101 – RFP Selection Process**

The core of a good deferred compensation plan starts with a well-designed Request for Proposal. Written correctly, RFPs can provide an unbiased road map making it easier to determine the best provider for your plan. Whether you have been through RFPs before or are new to the process, there is always something new to learn. The session will illustrate RFP design techniques that provide plan sponsors with the feedback needed to make a thorough evaluation of service provider proposals and pitfalls to avoid in the RFP design.

TRACK B – ADMINISTRATORS (More than 5 years in the industry)

Session 1: **Alternatives in Plan Administration Fee Assessment and Collection Models**

For many years the common model for plan administration fee assessment and collection has included “revenue sharing,” in which revenues collected by investment providers through 12b-1 fees, Sub-Transfer/Shareholder Services fees, and other related fees have been used to pay for record-keeping and other plan administration costs. These fees are usually percentage-based, and the fee amounts may vary among plan investments. Understanding these fees is critical for fiduciaries, and this session provides an understanding of the revenue sharing approach and examines alternative models, as well as exploring the question of whether specific participants or “the plan” should pay for elective services such as investment advice or financial planning.

Session 2: **403(b) Compliance**

Three years after the new 403(b) regulations went into effect, how are employers adjusting and what trends in compliance are developing? Should employers consider a single vendor? What about the applicability of fee disclosure? What “best practices” should be applied to 403(b) plans and who should be involved in those decisions? This session will focus on providing answers to these questions and more including what to do if the IRS comes knocking (or sending letters!).

Session 3: **Critical Questions for Fiduciaries about Guaranteed Income Products**

Given the diverse range of risks and uncertainties facing participants today - an aging population with longer life expectancies and an increasing reliance on the defined contribution plan for retirement savings - there are both tangible and psychological obstacles to achieving retirement security. An array of retirement income options are available to meet this need, but how can plan sponsors better determine the choices that are right for their participants? What risks and issues should plan sponsors pay close attention to in making a selection? To what degree can plan sponsors identify solutions that will provide the type of “base” retirement the workforce will require both to maintain basic lifestyles and cover unexpected contingencies? This session will help plan sponsors better analyze these questions, look at options available today, and discuss what may be available tomorrow.

11:30 a.m. – 11:45 a.m. **Coffee Break** *Sponsored by State Street Global*

11:45 a.m. – 1:00 p.m. Concurrent Sessions Divided by Track A & B (See Below)

TRACK A - NEW MEMBERS - DEFERRED COMPENSATION BASICS

Session 2: **DC 101 – Fiduciary Responsibility and the Investment Policy Statement**

Plan sponsors want to help provide the best possible retirement outcome for their participants. But with that goal comes fiduciary responsibility. It is important that plan fiduciaries understand their roles and their responsibility to act in a prudent manner for the exclusive benefit of the plan. This session will identify roles performed by plan fiduciaries, the role of your consultant, and the importance of documenting processes that help protect fiduciaries from getting into trouble with a focus on the function of the Investment Policy Statement in plan design.

REPEAT OF TRACK B – ADMINISTRATORS

Session 1: **Alternatives in Plan Administration Fee Assessment and Collection Models**

Session 2: **403(b) Plan Compliance**

Session 3: **Critical Questions for Fiduciaries about Guaranteed Income Products**

2:00 p.m. – 4:00 p.m. **NAGDCA Retirement Knowledge Quiz Bowl** (students and program directors)

2:00 p.m. – 5:00 p.m. **San Diego History & Education Event** (Sign-up Required) *Sponsored by ICMA-RC*

Wednesday, October 3

7:45 a.m. – 12:00 p.m. **Registration/ANC Foundation Silent Auction**

7:45 a.m. – 1:00 p.m. **Cyber Café and Charging Station** *Sponsored by Fidelity Investments*

7:45 a.m. – 4:30 p.m. **Louisville Convention and Visitors Bureau Information Table** (Site of 2013 Annual Conference)

7:45 a.m. – 8:30 a.m. **Breakfast – Recognition of ANC Foundation Donors** (Open to all)

8:45 a.m. – 10:00 a.m. **Concurrent Sessions** (All Attendees)

Session 1: **Challenges and Opportunities in Implementing the new DoL Participant Fee Disclosure Requirements**

The Department of Labor has issued finalized participant fee disclosure rules for defined contribution retirement plans that are subject to ERISA, and most governmental plans and Third Party Administrators (TPA) plan to implement these rules as well. Plan Sponsors need to know when this disclosure will begin, and what the new disclosure will look like. They also need to prepare for participant reactions to the new disclosures and to work with their provider to prepare a communication strategy that is suitable for their circumstances. This session will review the specifics of the DoL disclosure model, identify questions participants are likely to ask, and present information from leading TPA firms regarding their planned schedules for implementation and their communication efforts.

Session 2: **Benchmarking Your Plan – It's Not Just About Investments**

When most Plan Sponsors think about Benchmarking it's usually in relation to their investment lineup, however “best practices” would suggest that all aspects of your plan should be monitored. This session will focus on the reasons why, along with examples of how, you should be monitoring and benchmarking all aspects of your plan in order to truly fulfill your fiduciary

duties. Whether it is fees, services, participation rates or average participant balance - knowing how your plan stacks up to your peers is valuable to a successful plan.

Session 3: **Investment Innovations**

This session will focus on the latest investment-related solutions designed to improve retirement outcomes for participants, including a discussion of:

- Recent trends in terms of target-date funds, target-risk funds and managed accounts, vehicles playing an increasing critical role in U.S. worker retirement security
- Structuring benchmarks, including target-date fund benchmarks, to manage risk and help participants meet retirement income goals
- Strategies developed to incorporate investments commonly used in defined benefit (DB) pension plans now gaining popularity in defined contribution (DC) plans
- Solutions designed to combat inflation, diversify participant's holdings, and/or dampen volatility

Session 4: **The Impact of Social Media in Communicating with Participants**

In a world of texting, iPads, Facebook, and Twitter, participants are learning beyond the traditional seminar and individual consultation environments. This session explores the challenges that plan sponsors face in integrating these alternative communication channels to ensure that participants understand the key concepts and benefits of their supplemental retirement plans. Speakers will explore the most effective ways to take advantage of social media.

10:00 a.m. – 10:15 a.m. **Coffee Break** *Sponsored by Arnerich Massena, Inc.*

10:15 a.m. – 11:00 a.m. **NAGDCA Retirement Knowledge Quiz Bowl**

11:00 a.m. – 12:00 p.m. **General Session: Stable Value Funds**

Stable value is represented on 80% of defined contribution (DC) menus and accounts for over half a trillion dollars in assets. Its unique objective of attempting to provide principal protection and a yield in excess of money funds makes it particularly attractive to both conservative investors and plan participants in and near retirement. The credit crisis that began in 2008 has reshaped the stable value market place and the book value wrap contracts have become a commodity of limited supply, as many of the previous issuers of these contracts have elected to reduce their exposure or to leave the Stable Value market. This decrease in wrap capacity, in concert with today's low yielding environment, has caused both plan sponsors and wrap providers to take a more nuanced look at their stable value offerings. Given the current environment and complexities, the session will help plan sponsors be better informed to make decisions.

12:15 p.m. – 1:30 p.m. **Government Member Annual Business Meeting and Luncheon**

(Government members and students only)

12:00 p.m. **Guest Program** (Advance Sign-up Required) (Guests Only)

1:45 p.m. – 3:00 p.m. **Repeat of Concurrent Sessions** (All Attendees)

Session 1: **Challenges and Opportunities in Implementing the new DoL Participant Fee Disclosure Requirements**

Session 2: **Benchmarking Plans**

Session 3: **Investment Innovations**

Session 4: **The Impact of Social Media in Communicating with Participants**

3:00 p.m. – 3:15 p.m. **Coffee Break** *Sponsored by Aon Hewitt*

3:15 p.m. – 4:30 p.m. **Closing Session: Behavioral Finance**

Featured Speaker: Professor Shlomo Benartzi, UCLA Anderson School of Management

6:30 p.m. – 7:15 p.m. **Final Night Reception** *Co-Sponsored by Charles Schwab and NAGDCA*

7:15 p.m. – 10:15 p.m. **Final Night Dinner** *Entertainment Sponsored by TIAA-CREF*



Steven Montagna <steven.montagna@lacity.org>

A Complimentary Seminar Hosted by Buck Consultants - Overcoming Operational Challenges to Determine the Path Ahead

Buck Consultants <info@buckconsultants.com>
To: steven.montagna@lacity.org


Wed, May 2, 2012 at 6:27 AM

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Getting the best possible benefits from
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San Francisco Tuesday, May 29, 2012
Palo Alto Tuesday, May 29, 2012
Seattle Wednesday, May 30, 2012
Los Angeles Tuesday, June 5, 2012
Orange County Tuesday, June 5, 2012

Overcoming Operational Challenges to Determine the Path Ahead A complimentary seminar hosted by Buck Consultants

Please join us for the next series of roundtables exploring operational challenges in managing a defined contribution (DC) program. The format will be slightly different than the Q1 event, in that it will be a working session where you will have the opportunity to work through some mini-projects. We will take a few steps down the pathway to an effective DC program by dealing with key milestones necessary for successful operation.

The topics will include:

- Constructing an effective governance structure and why this is important.
- Developing a results-oriented committee where we will provide checklists and scoring metrics to determine how effective your committees are and what they need to document.
- Creating a useful investment policy statement where we will address the essential components of an investment policy and how to review and revise your current statement, (so bring it along). We will be addressing the development of an IPS in light of the recent court case – Tussey vs. ABB, Inc . We will also discuss global investment policies.
- Conducting your vendor searches, where we will address key criteria for selecting managers,

funds, insurers, and record-keepers both in the US and abroad.

With that in mind, Buck Consultants is pleased to invite you to the second of four complementary DC briefings in 2012.

Speakers

Al Scherlie – Principal, Buck Global Investment Advisors
Martha Spano – Principal, Buck Global Investment Advisors
Sandy Pappa – Principal, Buck Consultants
Craig Burnett – San Francisco Market Lead, Buck Consultants

Logistics

Tuesday, May 29, 2012

Hotel Nikko

222 Mason Street
San Francisco, CA 94102
Registration: 3:30 p.m.
Reception: 3:30 – 4:00 p.m.
Presentation: 4:00 – 6:00 p.m.
Cocktails and appetizers will be served
Valet parking: hosted

Tuesday, May 29, 2012

Four Seasons

2050 University Avenue
Palo Alto, CA 94303
Registration: 8:00 a.m.
Presentation: 8:30 – 10:00 a.m.
Continental breakfast will be served
Valet parking: hosted

Wednesday, May 30, 2012

Hyatt at Olive

1635 8th Avenue
Seattle, WA 98101
Registration: 8:00 a.m.
Presentation: 8:30 – 10:00 a.m.
Continental breakfast will be served
Valet parking: hosted

Tuesday, June 5, 2012

Omni Hotel at California Plaza

251 South Olive Street
Los Angeles, CA 90012
Registration: 8:00 a.m.
Presentation: 8:30 – 10:00 a.m.
Continental breakfast will be served
Valet parking: hosted

Tuesday, June 5, 2012

Hyatt Regency Irvine Hotel

17900 Jamboree Road
Irvine, CA 92614
Registration: 3:30 p.m.
Reception: 3:30 – 4:00 p.m.
Presentation: 4:00 – 6:00 p.m.
Cocktails and appetizers will be served
Valet parking: hosted

Who should attend

This event is intended for HR, retirement, and investment professionals who are responsible for managing their defined contribution plans around the world and who believe there are ways to improve their current plan strategies. Please feel free to share this invitation with your colleagues.

RSVP

This program is complimentary; however, advance registration is required. **Please RSVP by May 25** to Anastasia Lemle-Goodwin: anastasia.lemle-goodwin@buckconsultants.com or 310.226.1402.

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A Xerox Company

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