

401(k) Dinner Workshop

December 7, 2017

5:00 pm to 7:30 pm

The Winery Restaurant & Wine Bar

3131 West Coast Hwy, Newport Beach, CA

A 401(k) Dinner Workshop for Small Businesses You're invited to join other Orange County business owners and plan sponsors for this collaborative networking session and dinner.

There is a lot to keep up with when it comes to providing a successful 401(k) plan to your employees: day to day payroll administration, new regulations, managing plan costs and selecting investments are just a few examples.

Attendees will have an opportunity to gain insights from their peers and benefit from an educational session.

Why You Should Attend:

The purpose of the workshop is to bring small business owners and plan administrators together to exchange practical ideas for solving common problems, share little known industry resources to improve plan management, and support attendees with educational insights on 401(k) topics selected and voted on during the session kick-off.

Previous gatherings have included topics such as:

- Meeting your fiduciary responsibilities
- Determining reasonable fees for plan services
- The ideal plan design

Previous Attendees:

Business owners, CFOs / finance professionals, and human resources professionals who manage 401(k) plans in Orange County and the surrounding area with 10 - 400 employees.

Continuing Education Credits:



This session qualifies for the following . . .

This activity, ID No. 322987, has been approved for 1.50 HR (General) recertification credit hours toward aPHR™, PHR®, PHRca®, SPHR®, GPHR®, PHRi™ and SPHRi™ recertification through HR Certification Institute® (HRCI®).



Fisher Investments 401(k) Solutions is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CPSM or SHRM-SCPSM. This program is valid for 1.5 PDCs for the SHRM-CPSM or SHRM-SCPSM.



The content for this program is presented at The Plan Sponsor University and has been rated 4.5 out of 5 stars by previous attendees



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