



Duke Porter, CIMA®, C(k)P®
Vice President, Senior Financial Advisor,
Retirement Benefits Consultant

Invites you to

2017 Benefits Boot Camp

Speakers Include:

Jen Del Nero, Employee Benefits Security Administration,
U.S. Department of Labor

Maxine Moore, Group Health Investigations,
U.S. Department of Labor

Scott E Augenbaum, Supervisory Special Agent,
Federal Bureau of Investigation

Beth Lee Garner, CPA
BDO, Assurance Partner, Employee Benefit Plan Audits

Franklin Marriott Cool Springs
700 Cool Springs Blvd | Franklin, TN 37067

Thursday, September 28, 2017
7:30am Registration & Breakfast
8:00am Program Begins

RSVP to Kim Keller
615-747-5646 or kim.keller@ml.com

Thank you to our sponsors:

Renee Shafer, Williamson County Chamber of Commerce
Jerry Berg, American Funds
Brad Wyatt, Columbia Threadneedle
Kevin Johnston, Goldman Sachs
Diego R Betancourt, PIMCO
Pete Carlson, Transamerica
Brandon Shea, T.RowePrice

AGENDA

7:30 Registration & Breakfast

8:00 Opening Remarks

*Duke Porter, CIMA®, C(k)P®, Vice President,
Retirement Benefits Consultant, Merrill Lynch*

8:15 Market Update

Pete Carlson, Regional Vice President, Transamerica

8:30 Health Savings Account Overview

*Darrell Bussard, Vice President
Bank of America Merrill Lynch*

9:00 Hot Topics within the Executive and HR World*

*Beth Garner, CPA, Assurance Partner,
Employee Benefit Plan Audits, BDO*

10:00 Cybercrime and the Internet's Future*

*Scott E Augenbaum, Supervisory Special Agent,
Federal Bureau of Investigation*

11:00 Lunch

11:30 Investment Selection in a Fiduciary World

Jerry Berg, AIF®, Retirement Plan Counselor, American Funds

12:00 How Big is Your "F"

*John Carl, President, Retirement Learning Center,
Columbia Threadneedle*

1:00 Bonds: Resolving the Active vs. Passive Debate

Diego R Betancourt, Senior Associate, PIMCO

1:15 2017 Defined Contribution Themes in Focus

Kevin Johnston, Regional Director, Goldman Sachs

1:30 Getting it Right - Know Your Fiduciary Responsibilities*

*Jen Del Nero, Associate Regional Director,
U.S. Department of Labor*

2:30 What to Expect From a Health Plan Investigation *

*Maxine Moore, Senior Advisor, Health Investigations,
U.S. Department of Labor*

3:30 Empower Your Employee with Financial Wellness

Brandon Shea, Vice President, T. Rowe Price

3:45 Closing Comments, Duke Porter

**Approved for 1 hour CPE and HRCI credit*

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