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Coming
Soon

Protect Yourself, Protect Your Plan!

Start Date: 7/15/2020 8:00 AM

End Date: 7/15/2020 10:00 AM

Protect Yourself, Protect Your Plan! Retirement Plan Oversight & Best Practices Tami Wihlen,
Excel Securities & Joshua Beisker, Underberg & Kessler Wednesday, July 15th
7:30am-10:00am Landsman Development Corporation 3 Townline Circle Rochester, NY 14623
HR Professionals are

overloaded with responsibilities, deadlines, mandates, software, training etc. Join us for an
informational and interactive discussion about retirement plan compliance BEST
PRACTICES. We will... 1. Present ideas about how
to streamline your 401-k compliance demands by utilizing templates, leveraging
technology, and knowing what auditors focus on. 2. Present ideas how to
engage and inform other Company Executives/Owners about important aspects of
the company's plan.

3. Share what the repercussions
can be if you do not protect yourself and your plan. By the end of this session, participants will:
· Identify the top 5 retirement plan auditing priorities/mistakes. Understand what tools are available to help
ease plan compliance. Have a better understanding what your 401-k Service Providers should be doing for
you. Understand the financial implications of not protecting yourself or plan. About our Speakers:

Tami Wihlen: Tami is a Retirement
Plan Specialist and a Financial Advisor to both corporate and individual
clients. Tami
co-founded Excel's Qualified Retirement Plan Division and created a unique
compliance documentation system used in Internal Revenue Service (IRS) and
Employee Retirement Investment Saving Act (ERISA) audits. As a Retirement
Plan Specialist, she educates plan sponsors and participants regarding their
rights and responsibilities. Tami
brings a disciplined and balanced approach to her clients' planning objectives,
offering every client a high level of expertise, responsiveness, and
service. Tami

is a graduate of the University of Maryland with a Bachelor of Arts Degree in
Economics. Tami
is active in various community charities and has founded her own charity with
her two daughters. She has served on the Board for the National
Association of Women Business Owners, Small Business Council, and was a member