



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