

USE CODE:
ACSHRM21



2021 CLEVELAND VIRTUAL FIDUCIARY SUMMIT

PART OF THE 2021 RETIREMENT PLAN ROAD SHOW



DATE & LOCATION

TUESDAY, NOVEMBER 9TH

12:00 PM - 2:00 PM

*From the comfort of your home
or office!*



REGISTRATION COST

**\$150 FEE WAIVED
FOR QUALIFIED PLAN SPONSORS**

REGISTER USING CODE:

ACSHRM21



CE CREDIT APPROVED

EARN 2 CREDIT HOURS:

SHRM Professional
Development Credits (PDCs)

HRCI | SPHR | PHR | GPHR
CPE/CPA & CEBS Eligible

LOCAL HOSTS & GUEST SPEAKERS:

David Krasnow, President & Chief Executive Officer -
Pension Advisors

Beth Krasnow, President - Thrive Flexible Matching

Mike Manosh, Senior Vice President - Fidelity

Chuck Mullen, Chairman - Apple Growth Partners

Krista Steedly, CPA, Manager - Apple Growth
Partners

More Speakers TBA!

DISCUSSION TOPICS:

- What Every Fiduciary Needs to Know
- Retirement Industry Trends + Best Practices
- The New WOW Employee Benefit: Student Loans
- Plan Sponsor Attitudes
- Financial Wellness
- Convergence of Healthcare & Retirement
- Corporate Benefits
- More Topics TBA!

WHO SHOULD ATTEND:

FINANCE, HUMAN RESOURCE & BENEFIT EXECUTIVES

PLAN SPONSORS WITH 401k, 403b, 457 OR DB RETIREMENT PLANS

BUSINESS OWNERS AND FIDUCIARIES

REGISTER NOW:

Visit our event page for more information and to
reserve your seat!

CLICK HERE

Attendance Policy: The intended audience for each summit is exclusively for retirement plan sponsors. Priority will be given to plan sponsors who participate in the one-minute Retirement Road Show Survey and completion of the survey will grant a waived registration fee. This fee waiver is available with the use of the special code and on a limited basis. Approved guests will be granted: entrance, lunch, and access to summit reports. | *CPE: Xponential Growth Solutions is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors; HRCI: The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit; SHRM PDCs: X Growth Solutions is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CPSM or SHRM-SCPSM.