As an employer or 401(k) fiduciary are you confused, frustrated or overwhelmed by the ever increasing duties imposed by ERISA and the Depart of Labor? Are you confident you have the best 401(k) plan possible for your employees?

Join our panel of experts, including Brian Hanna the co-author of the 401(k) Owner’s Manual, for a discussion on current issues impacting qualified retirement plans. You will leave with a blueprint for building and maintaining an elite 401(k) plan. Attendees will also learn the affect of recent tax reform on 401(k) plans and the role of fiduciary liability insurance.

**AGENDA**

**7:30 - 8:00AM** Breakfast

**8:00 - 11:00AM** Presentations

**TOPICS**

- **Tax Reform**
  - Changes affecting 401(k) plans

- **The 401(k) Owner’s Manual**
  - 7 steps to reduce fiduciary liability
  - Understanding 401(k) plan costs
  - Implementing “auto” features
  - Employee financial wellness

- **Protecting Employers & Fiduciaries**
  - The role of fiduciary liability insurance
  - Types and terms of liability insurance

**SPEAKERS**

**Brian Hanna, AIF**

Senior Retirement Plan Consultant

Everhart Advisors

**Joe Urquhart, CPCU, CRIS**

Vice President

Overmyer Hall Associates

**Bill O’Malley**

Senior Director National Tax

RSM US LLP

**Columbus Workshop**

**Wednesday, May 9, 2018**

Scioto Country Club

2196 Riverside Dr.

Columbus, Ohio 43221

**Dayton Workshop**

**Thursday, May 10, 2018**

Moraine Country Club

4075 Southern Blvd.

Dayton, Ohio 45429

Please RSVP by Wednesday, May 2nd


Questions? LeAnn Young  |  614-717-9705  |  leanny@everhartadvisors.com

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Bill O’Malley
Senior Director National Tax | RSM US LLP

Bill is the head of RSM’s Compensation and Benefits practice. Bill and his experienced team assist RSM clients regarding a wide variety tax-related compensation, benefits and employee plan issues including health and welfare plans, taxation of executive compensation, taxation of qualified retirement plans, fringe benefit taxation, and workforce tax considerations. His professional credentials and affiliations include the American Institute of Certified Public Accountants, Illinois CPA Society, and is member of AICPA Health Care Reform Taskforce. Bill received his Bachelor of Arts at Quincy University and his Juris Doctor at The John Marshall Law School.

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