

FREE WEBINAR:

403(b) RETIREMENT RULES

Summary

Join Armanino McKenna, one of the leading accounting firms in California, for a free webinar designed to provide information to sponsors of 403(b) plans on the new regulations relating to the 5500 filing and audit requirements for these plans. The webinar will address compliance, administrative and reporting challenges that plan sponsors will be faced with as a result of the regulatory changes. Attendees will hear from experts in the compliance, third party administrative and audit professions on how these new rules will affect how they manage their 403(b) benefit plan.

Earn 1 California CPE Credit (Technical Subjects) by attending this webinar

What You Will Learn?

- How the filing and reporting rules for 403(b) plans have changed
- Requirements for sponsors to establish annual audit plan
- How to be proactive and efficient with the process to meet deadlines

Who Should Attend?

CFOs, Controllers, Human Resource Managers

Why You Should Attend?

403(b) plan sponsors need to understand the new rules and requirements that have dramatically changed the reporting requirements.

About the Speaker



Paul O'Grady, CPA, Partner, Armanino McKenna LLP
Paul graduated from University College in Galway, Ireland, in 1989 with a Bachelor's degree in Economics and Political Science. He heads up the nonprofit practice group at the firm and also serves on the firm's Accounting Standards Technical Committee. Paul is a member of the AICPA and the California Society of CPAs. Some of Paul's clients include Fine Arts Museums of San Francisco (de Young), Goodwill Industries of SF, Glide Memorial Board of Trustees and Foundation, SF Ballet and Tides Advocacy Fund.



Blake A. Thibault, Vice President, Heffernan Financial Services
Corporate Retirement Review Committee and has direct relationship responsibility for a number of the Firm's clients. Previous to Heffernan, Mr. Thibault was associated with Morgan Stanley as a Wealth Advisor and Retirement Planning Specialist. At Morgan Stanley, Mr. Thibault advised individuals, corporations and nonprofit organizations. At Heffernan, Mr. Thibault holds responsibility for assisting our corporate clients with plan and vendor evaluations, contract negotiations, implementation initiatives, investment selection and monitoring, comprehensive plan reviews and education strategies for plan sponsor and participants. Mr. Thibault holds a Bachelor of Arts degree in Public Administration from San Diego State University and holds a Series 7, Series 66 and Series 31 licenses and is an Accredited Investment Fiduciary.



Doug Ambrose, Managing Director, MassMutual Financial Group
Doug Ambrose has 20 years experience in the assisting Financial Advisors in designing retirement plan solutions for employers with Defined Contribution, Nonqualified, Defined Benefit and ESOP Plans. He has spent 17 years specializing in the Not For Profit market. At MassMutual, Mr. Ambrose is responsible for assisting Financial Advisors with retirement plan services including plan implementation initiatives, education strategies, investment selection and monitoring for plan sponsor and their employees.

SEMINAR INFORMATION

To register for this free webinar, visit the **REGISTRATION** link below. Webinar details will be sent upon registration.

REGISTER:

<https://www2.gotomeeting.com/register/574145354>

WHEN:

**Thursday, Feb. 18, 2010
10-11am (PST)**

Follow-up questions after the webinar? Contact:

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