



5.16.18

CFOP - SACRAMENTO

Annual Capital Forum on Pensions

The Capital Forum on Pensions provides an opportunity for Northern California retirement specialists to discuss employee benefits issues with colleagues. The program focuses on exchanging information and educating attendees about current regulatory, legislative, and administrative issues.

Keynote Speaker

BRIAN FURGALA, Esq., CPC, QPA of Wolters Kluwer's FTWilliam

Here is what our dear friend Sal Tripodi says about Brian:

"Brian has assumed seminar responsibilities for me with four-star results. One seminar client recently emailed to tell me how well Brian was received at the last seminar he did for me and they wanted to book him for the next year. He closed his email by saying that I have done a good job with my succession planning. I've known Brian since he started in the industry almost 20 years ago. In fact, I refer to him as my Pension Godson."

We are also proud to present Gary Allen of Prudent Investor Advisors, LLC & radio host of the KNBR talk show "Gary on Business"; Aaron Karr, CRPS, APA, QKA, Board Member of WP&BC; Mike Preston of Preston Actuarial Services, Inc.; Henry Giano of Empower; Eric Sharp of PenSys, Inc; Matthew Beaulieu of Franklin Templeton; ERISA attorney Scott E. Galbreath of Murphy Austin Adams Schoenfeld, LLP; and Zach Carstensen of John Hancock.

Who should attend?

Accountants	Benefits Directors	Plan Administrators
Actuaries	Consultants	Plan Sponsors
Advisors	HR Personnel	Practitioners
Attorneys	Investment Professionals	Third Party Administrators

* The conference will provide 7 hours of CE credit for AIF® and AIFA®, ASPPA, CFP, NIPA, ERPA, JBEA, MCLE AND CALIFORNIA & OREGON CPA.

AGENDA - AT A GLANCE

7:30 am
Continental Breakfast/Check In

8:15 am
Welcome and Introductions

8:30 am – 12:30 pm
MORNING SESSION

Updates on Tax Reform, IRS and DOL Developments, Compensation Issues and Ethics

12:30 pm – 1:30 pm
Lunch

1:30 pm – 2:30 pm
WORKSHOPS

- CalSavers: If You Don't Have a Retirement Plan, One Will Be Provided For You
- Retirement Plans from a Sales Perspective

2:45 pm – 3:45 pm
WORKSHOPS

- Breaking Down the Mechanics of a Retirement Plan
- Cash Balance Pre-Approved Plan Documents

4:00 pm – 5:00 pm
FINAL GENERAL SESSION

- DC & DB: Ask the Experts Panel

Arden Hills Resort
1221 Arden Hills Lane,
Sacramento, CA

[Need Hotel Reservations?](#)

Want more info?
Karin LeCocq
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