



SEPA SHRM
SHRM Chapter

Presents:

Navigating Retirement Plan
Fiduciary Issues in Difficult
Economic Times



APPROVED FOR 1.0 CREDIT HOUR
PHR AND SPHR
Tuesday, February 17, 2009
8:00 AM – 10:15 AM

at the Ramada Inn
11580 Roosevelt Blvd.
Philadelphia, PA

***Navigating Retirement
Plan Fiduciary Issues in
Difficult Economic Times***

In these tough economic times everyone is looking at their company 401(k) balances going down and down.

New regulations have made the employer more responsible in developing and maintaining the company's 401(k) plans.

Employers need to make sure there are enough options being offered to the employees, do they match/not match, should they follow the Safe Harbor rules, oversee rebalancing and fees.

Please join us for an informative presentation to learn about your company's fiduciary responsibilities and what you need to do to protect yourself.

We will also be swearing in our 2009 officers.

About our Speaker:
Dorann Cafaro, PRP, AIF
Managing Partner
Cafaro Greenleaf

Dorann is the firm's founding partner, with roots going back as far as 1981. She also is among the founders and serves as the Executive Vice President for National Retirement Partners, a leading national network of independent retirement experts. Dorann has been widely nationally recognized throughout the retirement industry. She was named Retirement Advisor of the Year by PLANSPONSOR magazine, was named by 401k Wire as one of the 50 most influential people in the 401k retirement industry, is a frequent and keynote speaker on the retirement industry at national conferences and seminars, has provided retirement education and consulting services for Fortune 500 companies, and has testified in front of the USDOL. Dorann has been a Regional Director of Retirement Services for Prudential Investments, a Corporate V.P. and National Director of Retirement Planning for PaineWebber, and a Senior Vice President of Marketing for a leading money management firm. She holds a B.S. from Marquette University in mathematics, and is Series 7, 8, 63, 65 and Health and Life licensed. With almost 30 years in the financial industry, Dorann is recognized for her unique and unbiased consulting advice, and genuine care for the

DIRECTIONS

The Ramada Inn is conveniently located on US 1; 3 miles south of the PA Turnpike exit 381, or 4 miles West of I-95 Woodhaven Road exit. The hotel's phone number is 215-464-9500.

PROGRAM SCHEDULE

8:00 Breakfast and Networking
8:30 Business Meeting, Introductions and "Hot Topics"
9:00 Featured Speaker
10:00 Networking

If you need a special accommodation to attend, please call (215) 698-7116

Please register and send your check in advance. You can always substitute a staff member if a conflict occurs.

**ONLINE REGISTRY IS UP &
RUNNING – ANY PROBLEM, JUST
PRINT OUT THE FORM & FAX TO:
215-698-7116**

SEE OUR CHAPTER WEB PAGE AT:

www.SEPASHRM.org

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Monthly BREAKFAST MEETING

TUESDAY

8:00 AM – 10:15 AM

February 17, 2009

Complete this registration form and mail it, along with your check to Susan Warner. Reservations must be received by Thursday, February 12, 2009.

If you are unable to meet this deadline, please call (215) 698-7116, by 10 AM, Friday, February 13, 2009, if you plan to attend.

Make your check payable to: SEPA SHRM and mail to:

Susan Warner, J.D., SPHR
Chapter Administrator
c/o Human Resource Trouble Shooters
9090 Pine Road
Office Suite A
Philadelphia, PA 19115
(215) 698-7116

Please note new fees:

SEPA SHRM Chapter Members	\$20.00
Non-Chapter Members	\$25.00
Full-Time SHRM Student Members	Free

Attending _____

Amount enclosed \$ _____

SHRM # _____

Name _____

Title _____

Employer _____

Phone Number _____

Guest Name _____

Employer _____

Phone Number _____

E-Mail _____

financial well-being of the retirement
plan, sponsor, and participants.



South Eastern Pennsylvania SHRM
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