

# JOIN US FOR AN *Exclusive* HALF-DAY FIDUCIARY TRAINING PROGRAM

**Learn how to better manage & optimize  
your company's retirement plan**

*— No Cost To Attend —*

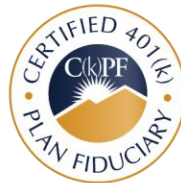
Top industry professionals will be presenting a TPSU 401(k) live educational program in your area. The Mission of TPSU is to enable plan fiduciaries to improve their retirement plan through education and training. This half-day program covers essential topics pertaining to retirement plan leadership. TPSU welcomes HR professionals, benefit specialists, business owners and retirement plan committee members who serve in any of the following capacities for their company retirement plan – Plan Fiduciaries, Plan Trustees and Plan Administrators. After successfully completing this Program an attendee will improve their understanding of:

- Responsibilities of a Plan Fiduciary
- Effective retirement management strategies
- Plan improvements with a high impact on plan outcomes
- Behavioral finance solutions to improve retirement readiness
- Key regulations – including the new DOL Rule
- Structure and oversight of a retirement plan committee
- Internal communication strategies

*401(k) and 403(b) Plans require special attention*

## What will you receive by attending?

1. Continuing Education Credits –  
5 SHRM PDCs / 5.5 HRCI (General) Credits
2. Certificate of Attendance
3. Complimentary access to the TPSU Learning Management System including the following topics:
  - ERISA
  - Fundamentals of 401(k) Plans
  - Understanding Participant Behavior
  - Retirement Plan Health
  - Retirement Readiness
4. Networking with colleagues responsible for retirement plans
5. Interaction with industry leaders
6. Breakfast and Lunch



**TPSU**  
THE PLAN SPONSOR  
UNIVERSITY

**Tuesday, November 13, 2018**  
8:00 AM – 2:00 PM

### Location:

**Phillips Academy Andover**  
Andover Inn  
4 Chapel Avenue  
**Andover, MA 01810**  
Meeting Room: Phillips Room

### Adjunct Lecturer:

David Clayman, C(k)P®

### **Registration**

**Online:** [www.TPSUniversity.com](http://www.TPSUniversity.com),  
and Proceed to the Program Schedule  
TAB, and Select your Program.  
Register with code “**2018SP**”.

**Call:** 855-755-4015 and Select  
Option 2. For more information  
regarding the session go to  
[www.TPSUniversity.com](http://www.TPSUniversity.com) or  
contact Marc Lester at  
[marc@TPSUniversity.com](mailto:marc@TPSUniversity.com).

**Space is limited!**

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