Retirement Plan Strategies and Opportunities:
A perfect storm (Recession + Retirement Plans)

This program is ideal for companies, business owners and individuals concerned about the impact that the current economic climate may be reeking on their retirement savings. Learn about how retirement plans are being influenced by the current recession and what you can do to help protect plan assets.

Enjoy an interactive session with experts in this arena. The session will provide an overview of:

- The state of Social Security, demographics, longevity and its impact
- The fiduciary role of plan trustees and being prepared for a Department of Labor Audit
- Plan design opportunities and case studies
- Investment education and a process to plan for the future
- The resurgence of Nonqualified Retirement Plans

Presenters:
Todd Scorzafava CFP is the Senior Manager at Amper Financial Services (AFS), the Wealth Management & Corporate Benefits arm of Amper, Politziner & Mattia. AFS provides financial planning, retirement planning, investments, wealth protection and preservation as well as estate planning services to both individuals and corporations.

John Bigley, CIMA, Manager, Corporate Retirement Plans has 30 years experience in the financial services industry, most of which focused on the retirement plan sector. Prior to joining AFS, he was a Senior Vice President, and the Global Director of Training for Citi \ Smith Barney, where he spoke internationally on retirement plan issues. A graduate of Seton Hall University, he earned his MBA from Fairleigh Dickinson. He is a Certified Investment Management Analyst through IMCA and the Wharton School of Business.

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NEW JERSEY SBDC
SMALL BUSINESS DEVELOPMENT CENTERS

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Date:
Thursday, October 29, 2009

Time:
Registration/Breakfast
7:30 AM - 8:00 AM

Presentation
8:00 AM -9:30 AM

Location:
The College of NJ
Loser Hall
2000 Pennington Ave. (Rt. 31)
Ewing, NJ 08628

CPE: 1 credits
Specialized Knowledge & Applications

Cost: $10 (non-refundable donation to SBDC – TCNJ, not related to CPE)
Includes breakfast
RSVP by 10/28/09

To register electronically:
click here

Phone Registration or for more information:
Lorraine Allen
The College of New Jersey
Small Business Development Center
609-771-2947
sbdc@tcnj.edu

"Seeing Beyond the Numbers..."
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CPE SPONSORS **Learning Objective:** Attendees will gain an understanding of the far reaching impact of the global recession as it relates to retirement planning and their fiduciary responsibilities. Further, they will learn about plan design issues to help maximize tax deferral and be advised of proposed regulations that may affect their current Plan's status.
What Attendees will be Able to do Upon Completion: Plan sponsors and Fiduciaries will be able to identify issues affecting their Plan and offer solutions that will help to avoid or minimize a DOL Plan Audit.
Who Should Attend: Business owners, CFO's, retirement plan sponsors, plan fiduciaries and trustees
Advance Preparation: None; **Prerequisite**: None; **Level of Knowledge:** Basic; **Delivery Method:** Group Live

Amper, Politziner & Mattia, LLP will grant 1 CPE credit in Specialized Knowledge and Applications for your attendance to this program.
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