Northern California Chapter

ISCEBS

January 27, 2021

Webinar: Multiple Employer 401(k) Retirement Plans

Effective January 1, 2021, there is a new way to structure 401(k) Plans that allows unrelated employers to join together and form a common 401(k) Plan. Initially designed to increase 401(k) coverage among small employers, Pooled Employer Plans may become the structure of choice for employers large and small as they seek to reduce their liability and focus on their core business. But what unforeseen issues may arise and slow down the adoption of PEPs?

Join the Northern California Chapter for this compelling panel discussion on Pooled Employer Plans and their cousins Association Retirement Plans & Group of Companies Plans. Included with your attendance will be a valuable cheat sheet on these new types of 401(k) plans.

Join the Northern California Chapter or renew your Chapter membership by January 15, and you plus one guest can view the webinar for free! (The annual dues for the Society are $295 and the Northern California Chapters' are $50.)

Join Now

DATE: Wednesday, January 27, 2021

TIME: 11:45 am - 1:00 pm (Pacific)

LOCATION:

COST: Free - Chapter Members
$50 - Non-members and guests

REGISTRATION: Please **click here** to register. Registrants will be emailed the webinar link on Tuesday, January 26, 2021. If you don't receive the link, please contact the Northern California Chapter at mlarhette@starkmillerfbg.com.

RSVP: By Monday, January 25, 2021.

QUESTIONS: Marc LaRhette, CEBS, (510) 839-0920, mlarhette@starkmillerfbg.com.

This webinar qualifies for one (1) CEBS Compliance credit.
Visit www.cebs.org/compliance for more information.

This program is pending approval for one (1) PDC toward SHRM-CP and SHRM-SCP recertification.

This program is pending approval for California Insurance continuing education credit.

SPEAKERS

Pete Swisher
Founder and President
Waypoint Fiduciary, LLC

Pete Swisher is a highly recognized thought leader within the U.S. financial services industry who serves as a consultant and fiduciary expert for retirement plans and their service providers, specializing in group programs such as Multiple Employer Plans (MEPs), Pooled Employer Plans (PEPs), Association Retirement Plans (ARPs), and group trusts. He is one of the nation's leading authorities on all aspects of retirement plan governance, including the ERISA Section 3(16) plan administrator, trustee, and named fiduciary roles, but also practical aspects of retirement plans such as product development and distribution strategies and methods.

Pete's expertise has been developed and shaped by 20+ years of service as a financial advisor, consultant, subject matter expert, government affairs leader, top-producing salesperson, sales executive, and brand-builder, giving him a unique balance of knowledge and experience about how retirement systems succeed from both a fiduciary and legal perspective as well as from a business perspective.

Crystal Coleman
Principal
CliftonLarsonAllen LLP

Crystal joined CliftonLarsonAllen (CLA) as an audit principal in January 2017 when GALLINA LLP joined the firm. At GALLINA she had been instrumental in building the firm's employee benefit plan audit practice, which she now leads for the Southwest region for CLA. Crystal has nearly 20 years of experience auditing and consulting on all types of employee benefit plans, including 401K and other defined contribution plans, defined benefit plans, health and welfare plans, fringe benefit plans and employee stock ownership plans. A regular presenter at various national conferences, Crystal continues to promote thought leadership through authoring various articles and webinar content for CLA.

Crystal believes in developing long term client relationships that don't just endure, but also add value. To this end, Crystal goes out of her way to answer clients' questions, give frank opinions, and proactively look for ways to benefit them. She never treats an audit as simply a compliance task, but as an opportunity to identify ways to do things better.

In addition to her responsibilities at CLA, she currently teaches graduate level accounting courses at the University of California at Davis. A lifelong learner, Crystal earned her Certified Employee Benefit Specialist (CEBS) designation in 2009 and has maintained continuous CEBS Fellowship status since 2010.

Register Now!