Risks & Strategies on Offering Employer Stock in a Retirement Plan
Co-sponsored by the Employee Benefits Institute of Kansas City

Wednesday, February 12, 2014 • 7:30 - 9:00 AM
KC MBA Conference Center
Credit: Missouri – 1.2 / Kansas 1.0
Cost: $25 Member and Non-Member

DESCRIPTION
The program will present an overview of the challenges surrounding large holdings of employer stock in 401(k) plans. In addition to discussing the legal risks attendant to such holdings, the program will discuss solutions to help mitigate these risks.

SCHEDULE
7:30 AM Registration
8:00 AM Seminar
9:00 AM Adjourn

SPEAKER:
DAVID COHEN, FIDUCIARY COUNSEL, EVERCORE TRUST COMPANY, N.A.

*Course materials will be provided in electronic format only and are accessible with your laptop, tablet or other mobile device during the event. Final course materials will be posted prior to the event at www.kccle.org. Go to the calendar, select the event and click on the Materials tab. Parking will be validated at the event.

**On-site registrations are welcome; however, seating and/or meals cannot be guaranteed unless you pre-register.

Upcoming EBI events
March 6, 2014 – How to Breeze Through Your Employee Benefit Plan Audits

4 WAYS TO PRE-REGISTER:
1. Online at www.KCCLE.org
2. Mail completed registration form with payment to KC MBA UMKC CLE, Two Pershing Sq., 2300 Main St., Suite 100, Kansas City, MO 64108.
3. Phone (816) 474-4322
4. Fax (816) 474-0103

Parking is available at Two Pershing Square via OK Street, off Grand Blvd on level P3. Visit kcmba.org/parking for directions and a map. Parking will be validated at the event.

Event cancellations received 48 hours or more prior to the start of an event may receive a cash refund minus a $25 processing fee, or a credit voucher in the full amount of fees paid which will be valid for one year from the date of the event.

Substitutions for paid registrations are accepted. Credit vouchers are transferable.

No shows will not receive a refund or credit voucher. No shows requesting refunds due to emergency or hardship must be received in writing no more than 30 days after the event date.

Special accommodations can be made by contacting KC MBA UMKC CLE at (816) 474-4322 prior to the program date.