



Kuttin Wealth Management
Ameriprise Private Wealth Advisory Practice

Workplace Financial Breakfast Series

2018

445 Broadhollow Road, Suite 120, Melville, NY 11747

8:30 am – 9:30 am

All presentations are complimentary to SHRM-LI Members and have been approved for SHRM and HRCI credits (1 hr):

Five Savvy Strategies for Tomorrow's Retiree

Melville: March 9, 2018

- Provides actionable and timely strategies that Advisors can deliver to employees who are nearing retirement

Recent Case Studies in Fiduciary Failures

Melville: June 1, 2018

- Takes a closer look at recent Fiduciary court cases and outlines several key lessons for Plan Sponsors and Service Providers

Prudent Practices for Plan Sponsors

Melville: Sept 14, 2018

- Educates Plan Sponsors on the Fiduciary environment created by the proposed DOL Fiduciary Rule, highlights the different Advisor business models that have emerged and provides ways to identify conflicts of interest

Rethinking Fixed Income in Defined Contribution Plans

Melville: December 7, 2018

- Discusses the evolving risks Plan Sponsors should be aware of within their Fixed Income offerings due to the interest rate and yield environment of the Asset Class

For further information contact: Elizabeth Saitta at (631) 770-0335 Ext. 131 or elizabeth.saitta@ampf.com