Legal & Regulatory Update

Legal & Regulatory Update

Join us on **Thursday, February 18th** for our Legal & Regulatory Update. Tom Bastin, JD, LLM, AIF, CEBS, Managing Director, will expertly guide this webinar and discuss several milestone issues to be discussed that impact DC plans including new Secure Act features, litigation issues, Cyber Security, missing participants, fiduciary insurance, proxy voting regulations and more.

February

18
Thursday

11:00 a.m. PT
2:00 p.m. ET

To register, RSVP to info@planwithpinnacle.com and you will receive a response with webinar access instructions.

Presented by Tom Bastin, JD, LLM, AIF, CEBS, Managing Director

Tom uses his expertise in plan design, administration, recordkeeping, compliance, investment analysis, fee analysis, vendor benchmarking, fiduciary governance and participant education to help plan sponsors and participants reach their retirement goals.

PlanAdvisor ranked Tom one of the “Top 100 Retirement Plan Advisers” in 2013 and 2015. *Financial Times* ranked him one of the “Top 401 Retirement Advisers” in 2015.

Tom passed the FINRA Series 65 (NASAA-Investment Advisors Law Exam) license. He earned a Bachelor of Arts at Purdue University, a Juris Doctor at Nova University and an LL.M. in Taxation Law from the University of Miami.

SHRM SHRM-CP | SHRM-SCP RECERTIFICATION PROVIDER 2020

Earn HRCI and SHRM CE credits. This session is pre-approved!

About The Pinnacle Group

We’re Here To Help You Design Your Plan At The Pinnacle Group, we understand that you work hard every day to build a successful financial future for yourself, your family, and your employees, if you also happen to be a business owner. Your hard work deserves to be rewarded with the financial future of your dreams. Our firm was founded on the belief that a successful tomorrow starts with a well-designed, thoughtful, plan today. We are a team of professionals highly qualified in serving the needs of individual investors, business owners, and other professional service firms, like Certified Public Accountants (CPAs). Not only do we have decades of experience in helping our clients plan and work towards achieving their personal financial goals, we are experts in the design, implementation, and management of employer sponsored retirement plans, like 401(k)’s and 403(b)’s. We take pride in knowing we have been instrumental in helping hundreds of employees understand and participate fully in their 401(k) and 403(b) plans, securing the possibility of achieving their own financial dreams.