



Legal & Regulatory Update

What Will the DOL Regulators Think of Next?

Join us on **Thursday, November 12th** for our Legal & Regulatory Update. Managing Director, John Nelson, will expertly guide this webinar.

John Nelson will discuss pertinent recent litigation and important regulatory topics that will impact nearly every advisor and plan sponsor including: proposed responsibilities for selecting/monitoring socially conscience investments, qualified plan loan offsets, interim rule for lifetime income participant disclosures and electronic disclosures, participation of long term part time employees, plus recent significant legislation. Content presented is appropriate for plan advisors, CFOs, human resource leaders, business owners, fiduciaries and all retirement plan committee members.

Presented by: **John Nelson**, Esq., Managing Director

November

12

Thursday

2:00 p.m. ET



Earn HRCI and SHRM CE credits.

This session is pre-approved!

Webinar Registration

RSVP to info@planwithpinnacle.com

Please be sure to include your contact information; webinar access instructions will be provided when you RSVP.

Questions? Call 513-874-4440 ext.107

We're Here To Help You Design Your Plan

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.