



*The New York Metro Area Chapter invites you to attend...*

## **Retirement Plans – The Changing Fiduciary Landscape**

Please join us as our speaker, Steve Bogner, of Treasury Partners, discusses the following:

- The changing landscape in retirement plan risk
- How employers are reducing risk
- What steps you can take to prepare for an audit
- How to continue to reduce retirement plan costs
- Using plan design to attract, retain and reward key talent

### **Steve Bogner Treasury Partners**

Mr. Bogner joined Treasury Partners in 2011, after eleven years with Morgan Stanley Smith Barney. He is responsible for Treasury Partners' retirement planning services with a primary focus on reducing overall plan risk and fiduciary liability. His areas of expertise include defined contribution/benefit plans and non-qualified deferred compensation plans.

Mr. Bogner is a Certified 401(k) Professional (C(k)P), and holds Series 7, 31, and 63 securities licenses, a Series 65 investment advisor license, and is life and health insurance licensed. He is a frequent contributor to Plan Sponsor Magazine. Mr. Bogner is a graduate of Baruch College – The City University of New York, where he majored in Marketing.

**Date:** Wednesday, February 20, 2019

**Time:** Registration check-in begins at 8:30 AM, Breakfast will be provided  
**Presentation / Q & A from 8:45 AM – 10:00 AM**

**Meeting Location and Directions:** **(new location!)**

**CBIZ & Mayer Hoffman McCann CPAs**

**5 Bryant Park (1065 Ave of the Americas) 11th Floor, New York, NY**

**Entrance is on 40th and between 5<sup>th</sup> and 6<sup>th</sup> (closer to 6th)**



# Online Registration Form

---

## Retirement Plans – The Changing Fiduciary Landscape

### **[REGISTER HERE](#)**

To attend you must register by **Friday, February 15<sup>th</sup> (5 PM)**

Attendees of this event will receive 1.5 hour CEBS CPE credit.

**This event will also be eligible for 1.25 hours of HRCI credit, pending approval by the HRCI, and 1.25 hours of SHRM PDC credit, pending approval by SHRM.**

**Members who have registered for this event and are not able to attend, please notify us no later than 9am on Tuesday, February 19. Non-members who are not able to attend must notify us by this date to receive a refund.**

#### **NY Metro Area Chapter Meeting Costs:**

Member – Free

Non-Member – \$30 Fee\*

*\* A CEBS student who pays for two monthly education sessions during the calendar year will gain NY Metro Chapter membership for the remainder of the year.*

#### **Payment for non-members of the NY Metro Chapter:\***

- Via PayPal, you will be taken to the payment page once you [register](#) for the event on our [website](#).

#### **All non-members must pay through PayPal.**

**Please contact Sue Andres if you have any questions or feedback regarding the registration process:**

E-Mail: [support@cebsnyc.org](mailto:support@cebsnyc.org)

*Sponsored by the New York Metropolitan Area Chapter of the International Society of Certified Employee Benefit Specialists (ISCEBS), a nonprofit organization that serves as an educational resource for certified employee benefit specialists and others in the employee benefits community.*

