

FINANCIAL ROUNDTABLE DISCUSSION

MARCH 20, 2:30 - 4:00 p.m.



HAPPY HOUR TO FOLLOW



**SALING
SIMMS**
ASSOCIATES

BOARD EDUCATION

Do you have new board members? Have money in your association for the first time? Does your foundation have significant assets? Do you know fiduciary liabilities? Are you investing correctly?

QUALIFIED RETIREMENT PLANS

Would you like to start a 401(k), MEP or a retirement plan? Perhaps review your current plan and explore new ideas to improve your benefit program for your members?

INDIVIDUAL PLANNING

Are you influenced by 'Facebook Finances?' Are you ready to plan for retirement? Do you need to consider estate planning, taking care of aging family members, or college expenses?

TO ANSWERS THESE AND MANY OTHER QUESTIONS...

ASSOCIATE WITH US!!

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