



The Pacific Northwest Chapter of the  
International Society of  
Certified Employee Benefit Specialists



## RETIREMENT PLANNING TRENDS & BEST PRACTICES

## CHAPTER WEBINAR

This presentation will help employers gain a clear understanding of their fiduciary obligations as retirement plan sponsors and learn how to effectively manage and reduce fiduciary risk.

We will also cover legislative updates impacting employer-sponsored retirement plans. Participants will be informed about recent changes in regulations and laws that may affect their retirement plans, ensuring they stay compliant and up-to-date with the latest requirements.

Finally, the presentation will provide effective strategies for alleviating plan administrative tasks and offering engaging employee education. Attendees will learn practical tips and best practices to streamline administrative processes, reduce costs, and enhance the effectiveness of their retirement plans, ultimately benefiting both employers and employees.

### TOP TAKE-AWAYS

1. Understanding retirement plan fiduciary responsibilities
2. Legislative updates impacting employer sponsored retirement plans
3. Effective strategies for handling plan administrative tasks and employee education

### SPEAKER

Jeff Schober joined the Gallagher retirement plan consulting team in 2019. With over eight years of experience consulting on defined contribution retirement plans, Jeff's areas of expertise include investment analysis, fee/service evaluation, fiduciary governance, plan design, and participant success. Jeff assists his clients with all aspects of the design, implementation, and oversight of defined contribution retirement plans. His consulting helps enrich his client's total rewards package, reduce fiduciary risk, and promote successful financial outcomes for employees.



## Join Us!

**December 5th**  
**11AM – 12 noon Pacific**

FREE EVENT for PNW  
Chapter Members

\$10 for non-PNW Chapter  
Members



- Qualifies for 1 CEBS continuing professional education (CPE) credit
- Approved for 1 PDC toward SHRM-CP and SHRM-SCP recertification
- Valid for 1 HR (General) recertification credit hour toward aPHR™, aPHRi™, PHR®, PHRca®, SPHR®, GPHR®, PHRi™ and SPHRi™ recertification through HR Certification Institute® (HRCI®)

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