2009 Breakfast with The Department of Labor:

RETIREMENT PLAN SPONSOR BEST PRACTICES

Wednesday, Sept. 23rd, 7:30 - 11:00 am

As fiduciary obligations continue to evolve, plan sponsors are challenged to keep abreast of the ever-changing legislation, the associated new reporting requirements, and the increased regulatory scrutiny. To help navigate these complexities, we cordially invite you to a complimentary breakfast workshop for a concise yet extensive discussion on compliance with IRS/ Department of Labor retirement plan regulations, while reducing your company and personal fiduciary risk. Financial Executives International (FEI) and Everhart Financial Group, Inc. are pleased to provide this unique opportunity to the plan sponsors and fiduciaries of Central Ohio.

EVERHART FINANCIAL GROUP, INC.
THE PREMIER RETIREMENT PLAN ADVISOR

Attendance is Free, but Seating is Limited

Speakers Include:

M. Scott Campbell
U.S. Department of Labor

Scott Everhart, CFP®, AIF®
Everhart Financial Group, Inc.

Tim Jochim, Director,
Kegler Brown Hill & Ritter

Topics of Discussion Include:

- **Surviving A Department of Labor Audit—**
  What is the DOL Looking For?
  Do You Have the "Right Stuff?"
- **Regulatory Updates—**401(k) Fair Disclosure and Pension Security Act of 2009
- **401(k) Fee Transparency and Cost Control—**
  Uncovering and Understanding Hidden Fees in Your Plan
- **Fiduciary Compliance—**Due Diligence and Best Practices
- **ESOP Transactions—**Tax and Performance Benefits, Costs and Pitfalls, Planning and Consummating the Sale

Wednesday, September 23rd, 2009

7:30 to 8:15 AM
Hot Breakfast Buffet and Networking

8:15 to 11:00 AM
Presentation and Panel Discussion

The Fawcett Center
2400 Olentangy River Road
Columbus, OH 43210

RSVP by September 18th to Brian Hanna, Everhart Financial Group, Inc.
(614) 717-9705 X 106 or (800) 337-3353 X 106
brianh@everhartfinancial.com

M. Scott Campbell, Supervisory Benefits Advisor for the EBSA, U.S. Department of Labor

Scott Campbell is the Supervisory Benefits Advisor for the Employee Benefits Security Administration, Cincinnati Regional Office of the U. S. Department of Labor, which covers the States of Ohio, Kentucky, Michigan and Southern Indiana.

Mr. Campbell, prior to assuming this position in 2004, was an Auditor/Investigator in the Cincinnati Office for sixteen years. Mr. Campbell was responsible for enforcement and compliance activities pursuant to ERISA, including the conduct of both civil and criminal investigations. Additionally, he has served on numerous Health Fraud Task Forces and coordinated investigations with the FBI, OIG, and IRS.

Mr. Campbell holds a Bachelor of Science degree in Accounting from the University of Kentucky.

Scott Everhart, President & CEO, Everhart Financial Group, Inc.

Scott Everhart is the President and founding firm member of Everhart Financial Group, Inc. Scott has specialized in the retirement plan market since entering the financial planning field in 1991. He has extensive experience in the retirement plan advisory area, including plan design, investment selection, participant education, and fiduciary liability protection. Scott is a nationally recognized expert on the topics of fee transparency, revenue sharing, and cost control.

In 2007, Scott received the honor of being named one of the nation's "20 Rising Stars of Retirement Plan Advisors" by Institutional Investor News. His organization has been nominated as the Retirement Plan Adviser Team of Year by PlanSponsor magazine. Scott has also been a guest lecturer at workshops presented with the U.S. Department of Labor and conferences hosted by the Center for Due Diligence, Ohio Society of CPAs, and others. Scott has been quoted in PlanAdviser/PlanSponsor magazine and the Columbus Dispatch, written articles published in Business First, appeared on the Ohio News Network (ONN), and was featured weekly on the radio show "Money Matters." He was recognized by Business First as a member of the Forty under 40 in 2005.

Scott has earned the designation of Accredited Investment Fiduciary® (AIF®), illustrating knowledge and competency in the area of fiduciary studies. He earned his Certified Financial Planner® certification in 1998. Scott received a Bachelor of Science degree, Magna Cum Laude, from Kent State University in 1990. He has degrees in both Finance and Business Management.

Scott serves on the Board of Directors of Farmers Citizens Bank. He is a member of the Financial Planning Association (FPA), Financial Executives International (FEI), Dublin (OH) Chamber of Commerce, and The Entrepreneurs' Organization-Columbus. Scott is a registered representative of and offers securities through Cambridge Investment Research, Inc., a registered broker/dealer, member FINRA/SIPC.

Tim Jochim, Director, Kegler Brown Hill & Ritter

Tim Jochim is chair of the Business Succession & ESOPs group at Kegler Brown Hill & Ritter and he is a national authority on ESOPs and business succession. He also is part of the firm's Mergers & Acquisitions and Employee Benefits & ERISA practice areas. He has been with the firm since 2007.

The nature of his practice has required Tim to develop expertise in the negotiation and structuring of business transactions, as well as in several substantive areas of law, including corporate, merger/acquisition, employee benefits and corporate tax. He has assisted clients in developing and implementing professional boards of directors and has lectured frequently to business and trade organizations on business succession and corporate governance.

Tim is also recognized for contributions to his industry. A former professor of corporate finance and business policy at several Ohio universities, he also has previously served as Manager of Industrial Development for the Ohio Department of Development. Tim is the co-founder of the Ohio chapter of The ESOP Association and a member of its legislative and regulatory committee. He is also a member of other professional organizations, such as the Association for Corporate Growth and the National Center for Employee Ownership.

Thank you to our partners:

fei financial executives international

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A LEGAL PROFESSIONAL ASSOCIATION

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