2011 BREAKFAST WITH THE EXPERTS:

CASH BALANCE PLANS & STRATEGIC TAX DEDUCTIONS

TUESDAY, MAY 24TH, 7:30 -10:30AM

Many business owners and partners/ shareholders of professional service groups can expect to pay up to 50% or more in combined Federal, State, and Payroll taxes.

We cordially invite you to a **complimentary breakfast workshop** for a concise discussion on an innovative, compelling **tax planning solution.** Learn how to optimize your company's retirement program from national leaders of a unique plan design, **allowing owners and partners/shareholders to maximize contributions, accelerate savings, and immediately lower taxes.**

Attendance is Free, but Seating is Limited
(2 hours CE credit available for CPA and PHR)

SPEAKERS INCLUDE:

Kevin A. Bergdorf, CPC, QPA
Principal, Trinity
Pension Consultants

TRINITY
PENSION CONSULTANTS

Steven S. Sansone, JD, AIF®
Principal, Kravitz
Investment Services

KRAVITZ

Annual **PRE-TAX** contributions of
$45k, $100k, or $200k+
may be possible!

RSVP by May 20th to

everhart
THE PREMIER RETIREMENT PLAN ADVISOR

(614) 717-9705 or (800) 337-3353 x106
info@everhartfinancial.com

LOCATION:

Scioto Country Club
2196 Riverside Drive
Columbus, OH 43221

TOPICS OF DISCUSSION INCLUDE:

- **Advanced Plan Design**—Maximize Executive Contributions & Tax Deductions
- **What is a Cash Balance Plan?**—Definition, History, and IRS Regulations
- **Who Should Adopt a Cash Balance Plan?**—From Doctors to Manufacturers
- **Plan Designs That Deliver**—Real Life Examples of Exceeding Client Expectations
- **Cash Balance Investment Strategy**—New IRS Regulations Increase Flexibility

SCHEDULE:

Tuesday, May 24th, 2011

- Hot Breakfast Buffet & Networking (7:30-8:15 AM)
- Speaker Presentations (8:15-10:00 AM)
- Questions & Answers (10:00 -10:30 AM)

Kevin A. Bergdorf, CPC, QPA
Principal, Trinity Pension Consultants

Kevin Bergdorf has nearly 15 years in the retirement plan industry, beginning with his Participant Services tenure at Charles Schwab. While at Schwab, he passed all five of the ASPPA exams within six months and passed level one of the CFA program. Kevin then moved to a local TPA firm as the Director of Administration where he was responsible for the corporate finances and had oversight of the entire Defined Contribution department, including administration and employee development.

In the spring of 2006, Kevin felt the urge to broaden his horizon again by starting his own TPA firm, but one with a fresh perspective on what financial advisors needed and wanted. Kevin is in charge of building the company's proprietary systems, infrastructure and also acts as a mentor to the employees. Kevin also manages relationships for Trinity's Defined Benefit clients. Kevin's goal is to grow the company through more efficient and profitable systems, and to maintain the balance of the company's culture of achievement and family. Kevin lives in Ohio with his wife and two children. He enjoys Brazilian Jiu Jitsu, traveling, music and target shooting.

Steven S. Sansone, JD, AIF®
Principal, Kravitz Investment Services

Steve Sansone has spent twenty-five years in the retirement plan industry. He currently is a Principal at Kravitz Investment Services. Steve is also a Principal and Board Member of Payden/Kravitz, a joint venture between Payden & Rygel and Kravitz Investment Services that offers a mutual fund investment strategy for cash balance pension plans.

Steve is a frequent speaker at National Pension Conferences on various aspects of qualified plans. His experience has helped him establish extensive knowledge in the various aspects of qualified plans including, plan design, fiduciary compliance, investments selection and monitoring, vendor product offerings, and participant education. Steve is also a presenter for the Kravitz Cash Balance Coach program and is a co-author of the book "Beyond the 401(k)." Steve helped establish the National Institute of Pension Administrators (NIPA) Los Angeles Chapter and served as its President for 10 years. He graduated from the State University of NY at Buffalo School of Law (Cum Laude) and serves as a member of the Board of Directors for Bank of Santa Clarita, in Santa Clarita, California.

THANK YOU TO OUR PARTNERS:

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