

# 2010 Breakfast with the Experts: Update from Capitol Hill



**Wednesday, March 31st, 8:00 - 11:00 am**

In the wake of the historic economic downturn, Congress and regulators have focused their attention on our country's retirement plan system—from the 401(k) to health care. As regulatory and legislative developments continue to evolve, the responsibilities of employers and retirement plan fiduciaries do as well.

**Everhart Financial Group, Inc.** is proud to provide a complimentary breakfast workshop for Central Ohio employers. We have the honor and privilege of welcoming **Congressman Patrick J. Tiberi**, representing the 12<sup>th</sup> District of Ohio, as a guest speaker. As a member of the **Ways and Means Committee**, Pat will share insight from Washington, D.C. on issues directly impacting your business and your employees, including the status of The Preserve Benefits and Jobs Act—bipartisan legislation he introduced along with Congressman Earl Pomeroy of North Dakota.

We hope you will plan to join us, along with other retirement plan sponsors from Central Ohio, for this most unique opportunity.

## **Speakers Include:**

*Attendance is Free, but Seating is Limited*



**Congressman Patrick J. Tiberi**  
12th District of Ohio



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

## **Topics of Discussion Include:**

- **Regulatory Updates:**
  - Plan-level Disclosure (ERISA 408(b)2)
  - Participant Investment Advice
- **401(k) Fee Transparency and Cost Control**—Hidden Fees, Revenue Sharing, and Asset-Based Compensation
- **Legislative Update:**
  - The Preserve Benefits and Jobs Act
  - 401(k) Fair Disclosure and Pension Security Act of 2009
  - Target Date Funds
- **Outlook for Tax Reform**

## **Wednesday, March 31<sup>st</sup>, 2010**

**8:00 to 8:30 AM**

Hot Breakfast Buffet and Networking

**8:30 to 10:30 AM**

Speaker Presentations

**10:30 to 11:00 AM**

Questions & Answers

### **The Fawcett Center**

2400 Olentangy River Road  
Columbus, OH 43210

**RSVP by March 26th to Brian Hanna,  
Everhart Financial Group, Inc.**

(614) 717-9705 X 106 or (800) 337-3353 X 106  
brianh@everhartfinancial.com

## **Congressman Patrick J. Tiberi, Representing the 12<sup>th</sup> District of Ohio**

Congressman Pat Tiberi is serving his fifth consecutive term as a common-sense leader representing the people of Ohio's 12<sup>th</sup> District, working to achieve a more fiscally responsible and accountable government. During the 110<sup>th</sup> Congress, the Republican leadership named him to the powerful Ways and Means Committee that oversees issues that affect us all, like taxes, Social Security, Medicare, trade and healthcare. Congressman Tiberi hopes to use his new position to ensure retirement security, make health care more available and affordable, and encourage responsible tax reform. He chairs the Select Revenue Subcommittee and is a member of the Income Security and Family Support and Social Security Subcommittees.

Congressman Tiberi's new responsibilities reflect his effective leadership over his tenure in the House of Representatives. On October 17, 2006, the President signed legislation written by Congressman Tiberi, the Older Americans Act Amendments, into law. This crucial bill reauthorized and improved critical programs for our nation's seniors.

His work in public office has gained him numerous honors, including more than a dozen statewide "Legislator of the Year" awards from groups ranging from the Buckeye State Sheriffs Association to the National Federation of Independent Business in Ohio. He's also been named a Watchdog of the Treasury for his efforts to protect taxpayers.

Congressman Tiberi, his wife Denice, and their four daughters attend St. Paul Catholic Church in Westerville.

## **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, cost control, and fiduciary liability protection. Scott is a nationally recognized expert on the topic of fee transparency and revenue sharing.

Among numerous honors, Scott was recently named as one of the nation's "300 Most Influential Advisors in Defined Contribution" by 401kWire.com., and as one of the nation's "20 Rising Stars of Retirement Plan Advisors" by Institutional Investor News. Scott has 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. He was recognized by Business First as a member of the "Forty Under 40" group in 2005.

Scott earned his Certified Financial Planner™ designation in 1998 and is an Accredited Investment Fiduciary® (AIF®), illustrating knowledge and competency in the area of fiduciary studies. Scott currently 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.

## **Thank you to our partners:**



**EVERHART FINANCIAL GROUP, INC.**  
THE PREMIER RETIREMENT PLAN ADVISOR



**KEGLER BROWN  
HILL & RITTER**  
A LEGAL PROFESSIONAL ASSOCIATION

