John Hancock RETIREMENT PLAN SERVICES

John Hancock Continuing Education Workshop

Earn up to 21 CPE Credits*
Program Level: Advanced
Delivery Method: Group-Live; QAS-SS
Administrative Practice

This program is provided without cost to licensed CPAs

Date: May 14th, 2019
Time: 7:30AM 10:30 AM
Location: Plymouth Area Chamber of Commerce
134 Court Street
Plymouth, MA 02360

Presented by: Adam Chase - Business Development Director

Hosted by:

Linda Clement, APR, APA, QKA, PFC, TGPA, Owner, Hills Pension Associates, Inc.

Marcia Mantell, RMA , NSSA , Owner, Mantell Retirement Consulting, Inc.

Adrienne Rowles, Financial Advisor, AAMS, Plymouth Rock Financial Partners, a financial advisory practice of Ameriprise Financial, Inc.

7:30 AM – 8:00 AM

Breakfast

8:00AM–9:00AM

ClassroomCourse-**Small Business Retirement Plans**

9:00AM–10:30AM

Correspondence/Self-Study Exam –**Retirement Plans for Small Businesses**

- Identify Small Business structures recognized by the IRS
- Learn about federal law regulating qualified retirement plans including ERISA
- Distinguish between Defined Benefit and Defined Contribution Qualified Plans
- Define basic characteristics and advantages of each type
- Recognize opportunities to reduce Employer tax liability

To register online, click on the link below

https://www.brokered.net/hancock/ma2/

You must register no later than 2:00pm (Eastern Time) on or before May 10th, 2019
If your registration is not received by the cutoff date you will not be permitted to take the exam onsite ("walk-in")

Once registration is complete, you will be redirected to download your study

*To receive CE credit you must take a correspondence self-study exam and receive a passing grade of 70% or higher

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Broker Educational Sales & Training, Inc. is the approved Sponsor for the CE portion of this program. Sponsor# 105731
Questions pertaining to the CE portion of this program please call 800-345-5669

Important Notice: please note that it is incumbent upon all participants who are registered representatives to have obtained permission from their respective supervising Broker/Dealer firms prior to participating in this Meeting.
This communication does not include unbiased investment advice from John Hancock. In the event a plan you advise selects John Hancock as a record keeper, John Hancock and its sales professionals and other employees who assist in bringing retirement plan business to John Hancock and retaining business will receive compensation.

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