

RETIREMENT PLAN DESIGN OPPORTUNITIES

PENSION REFORM continues in the forefront of legislative and tax policy changes. The passage of the ECONOMIC GROWTH AND TAX RELIEF RECONCILIATION ACT OF 2001 and the PENSION PROTECTION ACT OF 2006 represents THE MOST SIGNIFICANT CHANGE IN PENSION LAW in over two decades, affecting plan contributions, administration and testing. Most importantly, it affords NEW FLEXIBILITY FOR PLAN SPONSORS TO FAVOR KEY PARTICIPANTS, while at the same time controlling overall plan costs.

Qualifying Credits.....

- ▶ ***2 Hours CPE Credits***
- ▶ ***2 Hours CE Credits***

Topics that we'll cover.....

- ▶ ***How recent tax law changes affect your client's current plans?***
- ▶ ***Cross-Tested, Super Comparability Plans that favor the business owner.***
- ▶ ***Using Defined Benefit Plans to maximize contributions for owners, while limiting the cost for non-owner participants.***
- ▶ ***How a qualified plan can favorably impact other areas of your client's overall financial plan....i.e. estate planning and business succession planning.***

.....among others.

Thursday, May 17, 2007

9:30 AM - 11:30 AM

1350 Church Street Extension, 3rd Floor, Marietta, Georgia 30060

To register, call 404-822-6458, or email: joseph@aloisioclu.com

Presented by.....

Joseph Aloisio, CLU, MBA



With more than 20 years experience in the financial services industry, Joseph Aloisio has accumulated vast experience in the areas of business and estate planning for Owners and Executives of closely held and public corporations.

He earned his CLU Degree from the American College in Bryn Mawr, PA and his MBA Degree from the University of Rochester's William E. Simon School of Business Administration.

Securities and Investment Advisory Services offered through resource Horizons Group, LLC
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1350 Church Street Extension, 3rd Floor, Marietta, Georgia 30060 770-319-1970