



Improving 401(k) Plan Design to Achieve Participants' Retirement Income Goals While Taking on Less Risk

February 1, 2012

(Wednesday)

Schedule

8:00 a.m.—Registration and Breakfast

8:30-9:30 a.m.—Program

Holiday Inn—Orange County Airport

2726 South Grand Avenue
Santa Ana, California
(714) 481-6300

R.S.V.P.

January 27, 2012

Contact

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Cost

\$20 Los Angeles, Orange County and San Diego Chapter Members

\$30 Guests and Nonmembers (Nonmembers are welcome.)

Tax ID #33-0809839

Is your 401(k) designed to meet your participants' retirement income goals? How can you evaluate whether your plan is likely to succeed? How can we improve savings rates? How can we think about the investment options in the default plan as well as the core lineup? What advice is being given either directly or indirectly via design? Is the investment structure likely to meet participants' need for retirement income? How do we help participants weather the storms of market turbulence and impending inflation?

If these are questions your organization is concerned about, you will not want to miss this important breakfast meeting. In this presentation, you will learn more about the following:

- Measurements for determining financial health
- Is a plan sponsor's plan objective different than a participant's objective for plan health?
- How to fix some plan "illnesses"

Speaker

Stacy L. Schaus, EVP, DC Practice Leader, PIMCO

Ms. Schaus leads PIMCO's Defined Contribution Practice. Prior to joining PIMCO, she was a founder and president of Hewitt Financial Services, which includes defined contribution investment consulting and research as well as brokerage and personal finance. Ms. Schaus has written extensively on defined contribution issues, including the regular publication *PIMCO DC Dialogue™* and her 2010 book, *Designing Successful Target-Date Strategies for Defined Contribution Plans*. She has been named by *401k Wire* as among the 100 most influential leaders in defined contribution for 2009, 2010 and 2011. Ms. Schaus is the founding chair for the Defined Contribution Institutional Investment Association, serves on the board of the Employee Benefit Research Institute and is a past member of the Financial Planning Association board. She has 30 years of investment experience and holds an M.B.A. degree from the Stern School of Business at New York University and an undergraduate degree from the University of California, Santa Barbara.

Online Registration

Visit us at www.ociscebs.org to register for this meeting.

Mail Registration

Mail completed form to:
Orange County Chapter—ISCEBS
Attn.: Susan Bock, CEBS
The Balsler Group
23332 Mill Creek Drive, Suite 210
Laguna Hills, CA 92653
susanb@balsergroup.com

Please indicate whether you are a member, nonmember/guest on the registration form.

R.S.V.P. by January 27, 2012

Registration Form

Feel free to share this announcement with others interested in benefits.

PLEASE PRINT.



Orange County Chapter

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Name _____

Company _____

Address _____

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Telephone _____

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E-Mail _____

- Los Angeles, Orange County and San Diego Chapter Members
- Guest/Nonmember (Nonmembers are welcome.)

