SCPMG

Annual Investment Symposium
October 21, 2017

TIME	TOPIC	PRESENTER
8:00 AM	REGISTRATION AND CONTINENTAL BREAKFAST	
8:00 AM – 4:00 PM	One-on-One Meetings • *Pre-registration recommended* • *Refer to your personalized agenda in the online event app for your pre-registered appointment time*	Meet with representatives from: • Charles Schwab & Co. • Financial Engines • Kaiser Permanente Retirement Center (Common Plan) • Angeles Wealth Management
8:30 AM – 9:15 AM	Welcome and Introduction	Paul Minardi, MD Chairman, Retirement Committee
9:15 AM – 10:15 AM	Financial Advice for SCPMG Physicians *Everyone can benefit from help to reach their long-term financial goals. But how much help do you need and how do you choose? In this panel session, find out more about the comprehensive suite of financial planning and advisory services now available to SCPMG physicians.*	Moderator: Paul Minardi, MD Panelists: • Jon Foster, CEO Angeles Wealth Management • Mike Dickman, VP Schwab Retirement Plan Services • Chris Jones, CIO Financial Engines
10:15 AM – 11:00 AM	The Common Plan *An informative overview of your most important retirement plan benefit, including a Q&A with KFHP's Common Plan expert.*	Marcia Norgauer Kaiser Foundation Health Plan
11:00 AM – 11:30 AM	BREAK	
11:30 AM – 12:20 PM	MORNING BREAKOUT SESSIONS – ATTEND ONE SESSION	
1)	Angeles WealthPlan *This new service provides participants with a personalized, fully-integrated financial planning and investment management solution.* ***Angeles WealthPlan services are targeted to participants with a minimum of $1 million in out-of-plan family investment assets.***	Jon Foster Mark Shone Angeles Wealth Management
2)	Advice at Schwab *Whether you are a self-directed investor, or prefer to engage the expertise of others, Schwab offers a portfolio of solutions and a team of knowledgeable financial consultants across Southern California. Learn more about the services provided to SCPMG physicians by the 401K & Keogh plan recordkeeper for both in-plan and out-of-plan assets.*	Mike Dickman Schwab Retirement Plan Services

(see next page for additional sessions)

	3) Introducing the Next Generation of Help *Financial Engines introduces Personal Advisor, its new full-service approach to financial help. Taking advantage of the Financial Engines methodology and tools, Personal Advisor provides participants with a dedicated advisor for investment management across 401K, IRA, and taxable accounts.*	Jason English Financial Engines
	4) Asset Allocation for Do-it-Yourselfers (DIYs) *Don't want or need an advisor? This session is for you. Vanguard will offer up its time-tested asset allocation approach, which includes an investor questionnaire to help participants quantify their risk tolerance.*	Herb Colley The Vanguard Group
12:20 PM – 1:10 PM	LUNCH	
1:10 PM – 2:10 PM	Financial Planning Imperatives for Physicians of all Ages *Financial planning tips for all life stages. Topics include:* • *Getting the Biggest Bang for the Buck: Student Loan Repayment or Extra Retirement Savings* • *Revisiting 529 College Savings Plans* • *Estate Planning for Digital Assets and On-Line Relationships*	Matthew Sommer Janus Henderson Investors
2:10 PM – 2:55 PM	Interest Rates, the FED, and Economic Growth *This dynamic session dives into the future direction of government policies and their impact on interest rates, the FED, taxes, and GDP Growth.*	Vincent Reinhart Standish
2:55 PM – 3:10 PM	BREAK	
3:10 PM – 4:00 PM	AFTERNOON BREAKOUT SESSIONS – ATTEND ONE SESSION	
	1) Target Retirement Trusts *Target Retirement Trusts take the guesswork out of retirement planning by offering a diversified mix of investments that rebalance over time. Find out more about how Target Retirement Trusts work and how they can be incorporated into your retirement portfolio.*	Herb Colley The Vanguard Group
	2) Roth 401(k) *The Roth plan features allows you to make after-tax contributions to your 401K account – an option that might be right for you if you want a tax-free withdrawal option in retirement. Join this session to learn more about the guidelines and implications of making Roth 401K contributions or conversions.*	Crystal Dykstra Schwab Retirement Plan Services
	3) Investing in Growth Stocks *Janus professionals make the case for the long-term growth potential of investing in higher compounding, dynamic businesses and provide an update to the Janus Forty Concentrated Growth Fund.*	Jennifer Nichols Janus Henderson Investors
4:00 PM	SEMINAR CONCLUDES Complete Event Evaluation	