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“Post-Traumatic Fallout of PPA” with Cheryl L. Morgan, CPC, QKA, AIFA

Now that you’ve survived the first quarter of the PPA’06 benefit statement reporting requirements, bring your questions and find out what you did right, what went wrong, and what you should do hereafter. Cheryl Morgan has devoted hundreds of hours researching PPA and will provide valuable insights and practical recommendations on the following topics:

- Post-March 31st quarterly statement rundown/Q&As
- Distribution procedures/402(f) tax notices
- Non-spouse rollover notice
- Automatic rollover procedures
- Automatic enrollment procedures/forms

Cheryl L. Morgan, CPC, QKA, AIFA has more than 30 years of experience in business management, retirement plan consulting and administration. She established her own practice in 1989 to provide technical and management consulting to pension professionals and her experience includes consulting on more than 10,000 retirement plans with more than 50 different TPA/consulting firms.

Throughout her career, Cheryl has devoted a significant amount of time to education and training. After almost 20 years of teaching and mentoring people through the QPA and CPC programs, ASPPA honored her as Educator of the Year in 2000. Cheryl’s education experience includes service as a committee member for both ASPPA and NIPA. She also served as Director of Technical Education for ASPPA during 1997 and 1998.

Thursday, May 31, 2007
11:30 a.m. – 2:00 p.m.

Radisson Hotel Detroit-Bloomfield Hills (Kingsley Inn)
39475 Woodward Ave.
Bloomfield Hills, MI 48304
(248) 644-1400

Payment in advance: (Sorry, Refunds Not Available)
\$45 ABC of Detroit Members
\$75 Non-Members

Agenda:
11:30 a.m. – 11:45 a.m. Registration
11:45 a.m. – 12:15 p.m. Lunch (provided)
12:15 p.m. – 2:00 p.m. Presentation

Qualifies for 1.5 CE credits for ASPPA members

Speaker Disclaimer: The statements and materials presented at the ABC of Detroit are solely the opinions of the speakers and do not represent the opinion or the position of the ABC of Detroit. The ABC of Detroit does not assume any responsibility for the contents of the statements and materials presented.

Please complete the information below and send with payment to:
ABC of Detroit, Attn: Marlene DeBrosse, QKA
c/o Pulte Homes, Inc.; 100 Bloomfield Hills Parkway, Ste. 300; Bloomfield Hills, MI 48304-2950
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