



CURRENT TRENDS IN RETIREMENT PLANS INCLUDING ROTH IRAS AND ROTH 401 (K) PLANS

A Workshop for Professionals

SIGN UP BY October 28th!

November 5, 2009
8:00 a.m. - 11:30 a.m.
The Orchards at Broadmoor
Highway 280, Fletcher, NC

Topics: (2 credit hours)

CFP, CLE, CPE & ICEC approved

No pre-requisites or advanced preparation required

- A The use of Roth provisions of the Internal Revenue Code
 - Definitions and Eligibility
 - Conversions
 - Rollovers
 - Impact of use
- B Items of Interest in Retirement Planning
 - Plan disclosure proposals
 - Target date fund issues
 - Saving for retirement in a troubled economy
 - Fiduciary issues

Presenter: Eugene A. Ferreri Jr., Vice President and Compliance Officer for Institutional Advisory Services at First Citizens Bank. He has worked in the tax and employee benefits area for over 30 years. He received his undergraduate degree from Duke University and his law degree from the Marshall-Wythe School of Law of the College of William and Mary. Gene has spoken to various groups on retirement plan administration and tax planning. He will provide a lecture for this basic level workshop.

*Sponsored by the Pardee Hospital Foundation and Pardee Foundation Planned Giving Committee
Ryan Harman, Chair*

Pardee Memorial Hospital Foundation, Inc., chartered in 1996, is the fundraising arm of Henderson County Hospital Corporation (d/b/a Pardee Hospital). In the Foundation's fourteen-year history, more than \$21 million has been generated in gifts and pledges for services and programs of Pardee Hospital. Community education about the services and needs of Pardee Hospital is a key role of the Foundation.

Governed by a Board of Directors, the Foundation is a 501(c) (3) organization, approved by the Internal Revenue Service.

Vitaly important to the services offered by Pardee Hospital are the estate and planned gifts made by former patients and supporters of Pardee Hospital. Community professionals, including attorneys, CPAs, financial planners, and insurance professionals are often the key to the finalization of such planned gifts.

In the 56 year history of Pardee Hospital, estate and planned gifts have made many major projects possible.

This workshop has been designed to meet the standards of the NC State Board of CPA Examiners (21 NCAC 8G.0400), the Certified Financial Planner Board of Standards for continuing education credit, the standards of the N.C. Bar Board of Continuing Legal Education, and the NC Department of Insurance continuing education requirements(11 NCAC 06A.0809)

Breakfast at no charge. No registration fee.

***** **Registration at 8:00 a.m.** *****

Workshop for Professionals Registration Form

Space is limited. Please register by October 28, 2009

by calling 828-696-4666 or email: linda.lucha@pardeehospital.org

or mail: Pardee Hospital Foundation, 800 N. Justice Street, Hendersonville, N.C. 28791

or fax: 828-696-4665



Name _____
 Title _____
 Company _____ Email _____
 Mailing Address _____ City _____ State _____ Zip _____
 Phone _____ Fax _____

____ I plan to attend the workshop from 8:00 a.m. to 11:30 a.m.

My attendance may qualify for ____ CFP ____ CLE ____ CPE ____ ICEC
 ____ Not applicable to me

Disclaimer: Pardee Hospital Foundation is registered with the N.C. State Board of CPA Examiners as a sponsor of continuing professional education. Complaints or comments regarding registered sponsors may be addressed to the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh, NC 27605.