



Navigating Change within Retirement

Start Date: 3/22/2023 8:00 AM

End Date: 3/22/2023 10:00 AM

Navigating Change within Retirement Plan Industry

Wednesday, March 22nd

8am - 10am

Paul Winkler, ESL Investment Services & Michel Manosh & Bradford Pineault Fidelity Institutional

IN-PERSON & VIRTUAL OPTIONS

In-person location:

Compeer Rochester

259 Monroe Ave (Trillium Building)

Rochester NY 14607

Presenting and discussing results of annual Fidelity survey on trends and best practices.

Retirement plans legislative update: SECURE 2.0 – big changes coming!

Market commentary update discussing inflation, recession possibilities.

By the end of this session the attendee will :

Consider amending their own plan based on trends, participant needs

How their own retirement plan might be impacted by SECURE 2.0