

NH HICKS 2021 WEBINARS

QUALIFIED PLANS IN TODAY'S ENVIRONMENT

This series of three educational Webinars is designed for accountants, financial advisors and others in the financial community interested in selling and servicing clients in today's business environment. Each one-hour webinar is available for CPA and CFP® continuing education credit (3 hours total).

1. DEFINED CONTRIBUTION PLAN OVERVIEW

DC Basics, 401(k), Solo(k), Safe Harbor, Limits and Testing, Cycle 3 Restatements

2. DEFINED BENEFIT PLANS AND CROSS TESTING OVERVIEW

DB Basics, DB/DC Combination Plans, Cross Testing, Cash Balance and PBGC

3. FIDUCIARY AND LEGAL REVIEW

SECURE Act, New Cases and Regulations, Red Flag Issues, and Real Estate

These Webinars are one hour long, just click on the webinar(s) you want and register online.

Course 1. Defined Contribution Plan Overview (Tuesday)

[June 15th – 10AM PST](#)

Course 2. Defined Benefit Plans and Cross Testing Overview (Wednesday)

[June 16th – 10AM PST](#)

Course 3. Fiduciary and Legal Review (Thursday)

[June 17th – 10 AM PST](#)

Or, indicate the Webinar date above, complete the information below and return by email or fax.

Name _____

Firm _____ CFP# _____

Phone _____ E-mail _____

For more information, contact Samantha Rath at srath@nhhicks.com / (530) 891-4975 Fax: (530) 891-4185 / 1294 E. 1st Avenue, Suite 110, Chico, CA 95926 / [NH Hicks website](#)

Please feel free to share this invitation with anyone who might be interested.