

# Explore the Power of Your 403(b) Retirement Plan

Hosted by Boardman Wealth  
Planning, with special guests  
from TIAA-CREF

Hilary J. Boone Center  
March 8, 2012 - 4:30pm



# 403(b) Retirement Plan New Developments

You are cordially invited to join Boardman Wealth Planning and representatives from TIAA-CREF in a discussion regarding new developments within the 403(b) retirement plan environment.

Topics discussed will include:

- 2012 Roth 457(b) Updated Tax Law
- 403(b) State Income Tax-Free Withdrawals
- Deferral Maximization Strategies
- Benefits of a Fiduciary Relationship
- Explanation of 403(b) Voluntary, 457(b), and GSRA accounts
- In-Depth Analysis of Newest Fund Offerings
- Coordination with Comprehensive Financial Plans

**Hilary J. Boone Center**  
**March 8<sup>th</sup>, 2012 - 4:30pm**

**Invitations to this event are by personal invite only and are not open to the public. Attendance will be capped and a reservation is required to attend. Please contact Christine McCabe from Boardman Wealth Planning at 859-226-0625 or [cmccabe@boardmanwealth.com](mailto:cmccabe@boardmanwealth.com) to reserve your attendance prior to March 6<sup>th</sup>.**



Boardman Wealth Planning, inc. is independent from the University of Kentucky and is not sponsored by, affiliated with, or in any way related to TIAA, CREF, or any of their affiliates or subsidiaries (collectively, "TIAA-CREF"). TIAA-CREF has not reviewed and is not responsible for any of Boardman Wealth Planning's content. Any TIAA-CREF materials or TIAA-CREF information linked or provided by Boardman Wealth Planning, Inc. are based on sources TIAA-CREF believes to be reliable, but TIAA-CREF does not guarantee that such materials or information are accurate or complete. Teachers Personal Investors Services, Inc. and TIAA-CREF Individual & Institutional Services, LLC, Members FINRA/SIPC, distribute securities products." Boardman Wealth Planning's securities are offered through Comprehensive Asset Management and Servicing, Inc. ("CAMAS"), 2001 Hwy 46, Ste 506, Parsippany, NJ 07054, 1-800-637-3211, Member FINRA/SIPC. Boardman Wealth Planning, Inc. is independent of CAMAS. Advisory Services Offered Through Boardman Wealth Planning, Inc.