

# DEFEND YOUR RETIREMENT PLAN AGAINST CYBER CRIME

## *Best Practices for Confronting Ongoing Threats to Retirement Plan Sponsors and Participants*

**Madison**  
**Wednesday, May 15**

**Milwaukee**  
**Tuesday, June 4**

**The Madison Club**  
**5 E Wilson Street**  
**Madison, Wisconsin 53703**

**Sheraton Hotel in Brookfield**  
**375 S Moorland Road**  
**Brookfield, Wisconsin 53005**

Join our colleagues from DeWitt LLP and Francis Investment Counsel as they discuss how plan sponsors can address rising concerns regarding cyber security while also refining their overall retirement plan oversight process.

### **Featured Speakers:**

Brian L. Anderson, JD, LLM, CPA, CEBS  
Partner  
DeWitt LLP

Michael J. Francis, JD  
President – Chief Investment Officer  
Francis Investment Counsel

**7:30 AM**      **Registration & Continental Breakfast**

**8:00 AM**      **What to Do About the Rising Threat of Cyber Crime**

*With massive data breaches occurring regularly and nearly \$30 trillion in U.S. retirement assets, it is no wonder cyber crime within corporate sponsored retirement plans is rapidly rising. Hear what other plan sponsors are doing to defend against cyber security threats and understand:*

- *What language and loopholes to identify in vendor service agreements*
- *Latest recordkeeping technology available to combat cyber threats*
- *Plan design and control measures to improve protections*

**9:00 AM**      **Protecting Your Plan Through Prudent Oversight**

*The best defense against any threat to plan sponsors is a prudent plan oversight process. Review best practices for plan oversight and walk away with strategies for:*

- *Protecting shareholders and plan fiduciaries through a well-structured committee charter and investment policy statement*
- *Effective process for selecting, monitoring, and terminating investment managers*
- *Evaluating, containing, and allocating plan costs*

**10:00 AM**      **Open Discussion – Other Ongoing Concerns and Trends**

**10:30 AM**      **Closing Remarks**



**FRANCIS**  
Investment Counsel LLC

**REGISTER ONLINE:**  
[francisinvc.com/register](http://francisinvc.com/register)

Contact Anne Loppnow for additional information.  
Email: [anne.loppnow@francisinvc.com](mailto:anne.loppnow@francisinvc.com) | Call: 262-781-8950

# DEFEND YOUR RETIREMENT PLAN AGAINST CYBER CRIME

*Best Practices for Confronting Ongoing Threats to  
Retirement Plan Sponsors and Participants*

## EVENT DETAILS

---

**Madison**  
**Wednesday, May 15**

**The Madison Club**  
**5 E Wilson Street**  
**Madison, Wisconsin 53703**



### Driving Directions

#### Parking Options:

The Hilton Hotel Ramp is located next door; parking is charged at a rate of \$3.50/hr. with a maximum \$18 daily rate. Parking spaces designated as "Madison Club Members Only" are reserved for members who pay a monthly parking fee. Those who park in these spots without a permit run the risk of receiving a parking ticket.

Government East Ramp is located on the corner of S. Pinckney and E. Wilson Streets; parking is charged at a rate of \$1.40/hr. with a maximum of \$5 daily rate for those who park after 5:00PM.

The Monona Terrace Ramp is located on W. Wilson Street just west of S. Carroll Street. Parking is charged at a rate of \$.70/half hr. with a maximum \$4 daily rate for those who park after 5:00PM.

**Milwaukee**  
**Tuesday, June 4**

**Sheraton Hotel in Brookfield**  
**375 S Moorland Road**  
**Brookfield, Wisconsin 53005**



### Driving Directions

---



**FRANCIS**  
Investment Counsel LLC

**REGISTER ONLINE:**  
[francisinvc.com/register](http://francisinvc.com/register)

Contact Anne Loppnow for additional information.  
Email: [anne.loppnow@francisinvc.com](mailto:anne.loppnow@francisinvc.com) | Call: 262-781-8950