



The Association of Colorado Independent Schools and
Smith+Howard

Present

Top 10 Benefit Plan Operational Errors and How to Prevent Them

Date: February 15, 2024

Time: 9:00 a.m. MST

Location: via Zoom

Webinar Description:

Now is the time to assess and improve operational management of your school's 401(k) or 403(b) benefit plan. Join us for an exclusive webinar for ACIS members covering the "Top 10 Operational Errors in Benefit Plans and How to Prevent Them." This fun and fast paced session will highlight the errors Smith + Howard's benefit plan specialists see most often. Our presenters will show you how to avoid those errors and efficiently manage your school's 401(k) or 403(b) benefit plan while reducing risks and ensuring positive outcomes for participants. By tackling potential stumbling blocks in advance, you'll pave the way for a year of success and stability.

As a dedicated resource for independent schools, the team at Smith + Howard is committed to supporting your organization's success in navigating the challenges of benefit plan compliance and fiduciary responsibilities.

Register now to secure your (free) spot and equip your organization to streamline and reduce risk in your benefit plan. *Registration is required and open to independent school leaders. CPE credit will be provided to financial professionals.*

Meet the Smith + Howard Speakers:

[Claudia Perez](#), Assurance Senior Manager and Benefit Plan Specialist

[David Lee](#), Partner, and Independent School Practice Leader

[Brandy Swanson](#) (Moderator), Sr. Business Advisor