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1.0 Other-Office Management CLE Credit – A/V Approval #1081690

Recording Date - June 13, 2018
Recording Availability – October 1, 2018

Meeting Location	Date	Time	Topic
King County Bar Association 1200 Fifth Avenue - Suite 700 Seattle, WA	**Wednesday, June 13, 2018**	12:00 PM to 1:15 PM	Retirement Plans for Solo Practitioners and Small Firms

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AGENDA

12:10 PM Presentation: 'Retirement Plans for Solo Practitioners and Small Firms', by John Aronson, Securian Advisors Northwest and Kim Carolan, Evergreen Retirement Plan Consulting

- Retirement plan options for lawyers in small firms-IRA, SEP, SIMPLE, 401k (solo or non-solo), Defined Benefit and Cash Balance plans.
- Decision should be driven by goals (personal retirement, recruitment and retention) and budget.
- Key features to consider
  - Maximum contributions
  - Minimum obligations to employees (i.e. 401k testing)
  - Loan availability
  - Flexibility with pre-tax and post-tax dollars

1:15 PM Adjourn

SPEAKER BIOGRAPHY

John Aronson, Securian Advisors Northwest – John hails from the Washington, DC area and moved to Seattle in 2008. He completed his undergraduate degree in history at University of North Carolina-Chapel Hill. After a long, successful career in photography, John decided to change careers once he moved to the Pacific Northwest.

John was drawn to financial planning after starting his family in 2002. He realized the importance of having a comprehensive financial plan, particularly when there are dependents involved. John passed the CFP® exam in 2011 and began his career at MassMutual. Currently, his practice focuses on retirement planning for individuals and business owners. He holds his FINRA Series 7 and 66 registrations as well as insurance licenses in a number of states.

Because of the emphasis placed on financial planning, John chose to partner with Securian to continue to grow his practice.

Kim Carolan, Evergreen Retirement Plan Consulting – Kim founded Evergreen Retirement Plan Consulting, LLC in 2011 along with her business partner, Joseph, an Enrolled Actuary. Kim heads up business development and marketing efforts for the firm while helping manage and administer many operational aspects of the firm as well. She enjoys working on plan design for new or existing retirement plans, helping clients find solutions that meet their unique business goals within the retirement plan scope.

Kim started out in marketing while still getting her B.S. in Business from Arizona Christian University. She worked in fundraising and tutoring while finishing her degree. Since then, she graduated in 2004 and worked further in the non-profit world doing board relations, continuing education event planning, public relations and marketing.

Her additional education includes an MBA (almost done) and other professional designations, such as the Group Benefits Associate (GBA), Retirement Plans Associate (RPA) and Certified Employee Benefits Specialist (CEBS).