



# Merrill Lynch

MERRILL LYNCH OF GARDEN CITY ALONG WITH  
MCDERMOTT WILL & EMERY  
AND PAYCHEX  
CORDIALLY INVITES YOU TO OUR:

## Employee Benefit Plans WORKSHOP

**4 CPE CREDITS  
For CPAs**

**DECEMBER 12, 2007 - 8:00 a.m. to 11:45 a.m.**

- Retirement Plan Fees and Expenses
- 401k Regulations
- Roth 401(k)
- Recent Regulatory Guidance involving 403(b) plans, Cafeteria plans, Qualified Default Investment Alternatives
- IRS Employment Tax initiatives, and Examination Activity

**Speakers:**

- **Louis F. LiBrandi-Director of Compensation and Benefits & Jonathan Boyles-Associate -McDermott Will & Emery**
- **Richard Schwamb-Accredited Retirement Plan Specialist-Merrill Lynch**  
**Brian Malfettone-Chartered Retirement Planning Counselor-Merrill Lynch**
- **Doug Paget-District Sales Manager-Paychex**  
**Bill Faggiano-Retirement Consultant-Paychex**

**Location: 1325 Franklin Avenue, 3<sup>rd</sup> Floor**  
**RSVP to Megan Krokos at [mkrokos@mwe.com](mailto:mkrokos@mwe.com) or 312.984.2013**  
**Breakfast and Lunch will be served**

