

Calendar of Events

February 26, 2020

CFO and Controllers SIG - The SECURE Act: What it means for retirement plans

Cordia Partners

8330 Boone Blvd

Vienna, VA 22182

07:30 AM - 09:00 AM EST

Bob Burkett,

bob.burkett@kineticcpagroup.com

Topic: The SECURE Act: What it means for retirement plans

The SECURE Act is hot off the press! As the most impactful legislation on retirement plans since the Pension Protection Act of 2006, we will discuss the changes and implications of SECURE for organizations and their retirement plans.

Objectives

During this discussion, participants will:

Learn how the SECURE Act will impact retirement plans

Learn the implications of SECURE Act for organizations

Learn about the impactful

Time: Doors Open 7:30 AM; Meeting 8 to 9 AM (One hour CPE available); refreshments provided

Speaker: Courtenay Shipley, CPFA, AIF, CRPS

Chief Planologist, Retirement Planology

Courtenay Shipley is the Chief Planologist of Retirement Planology, Inc, a registered investment advisory firm specializing in corporate and non-profit retirement plans.

Courtenay has a diverse background in the retirement plan industry providing a unique foundation for her clients in the areas of fiduciary responsibility, investment analysis, and participant education. During her career she has provided institutional investment consulting to qualified retirement plans, developed business strategy for a boutique third party administrator and recordkeeper, conducted over 9,000 education meetings to groups and individual employees, and served the non-profit and government market.

Courtenay is a graduate of Vanderbilt University, and is licensed as an investment advisor representative (Series 66). She holds the Accredited Investment Fiduciary™ (AIF®) designation through the Center for Fiduciary Studies, the Chartered Retirement Plan Specialist (CRPS) designation from the American College of Financial Planning, the Certified Plan Fiduciary Advisor (CPFA) from National Association of Plan Advisors, and the Certified Health Savings Advisor (CHSA) designation. Since 2015 she has been featured in the Financial Times Top 401 Retirement Plan Advisors annual list, named a Top Women Advisor All-Star by the National Association of Plan Advisors (2015, 2017-2019), named a 2018 NAPA Young Gun: Top 75 under 40, and is a member of the Retirement Advisory Council. Please see our website for award description and criteria: www.retirementplanology.com/award-criteria.

About Retirement Planology: Retirement Planology is a consulting and investment advisory firm that navigates organizations to smart decisions on their employee retirement plan. Plans are complicated and highly regulated at every twist and turn. As your navigator and investment fiduciary, we help map out investment decisions, hiring providers, plan features, engaging employees, and taking work off the plan sponsor's plate. Rely on us to keep the plan in alignment with your organization's goals.

retirementplanology.com

Thank you to Cordia Partners for providing the venue!

March 10, 2020

Government Contracting SIG

Tower Club

8000 Towers Crescent Drive, Suite 1700

Tysons, VA 22182

07:00 AM - 09:30 AM EST

Details to follow.

Benefits: 1 hour of CPE, along with a breakfast buffet.

Time: Doors open at 7:00 AM, Speaker starts at 8:00 AM, done by 9:30 AM.

March 17, 2020

Chapter Event - Securing your Wealth under The SECURE Act

Maggiano's Little Italy

Tysons Galleria

McLean, VA 22102

07:00 AM - 09:30 AM EST

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info@ncvscpa.org

Join Northern Chapter VSCPA as we welcome back Evan Beach, CFP®, AWMA®, with Campbell Wealth Management. Mr. Beach will discuss "Securing your Wealth under The SECURE Act".

If you've turned on CNN, Fox News or MSNBC in the last three months, most of the headlines you've seen focused on impeachment, the trade war and Corona Virus. It's reminiscent of Groundhog Day. What have you not seen? The passage of the "Setting Every Community Up for Retirement Enhancement Act." Not because of the mouthful it is, but because the SECURE Act was attached to an appropriations bill that was rushed through both houses to prevent another government shutdown.

What is clear for anyone who is paying attention, there are significant implications in this bill for savers and for retirees. This class focuses most of its content on the implications for distributions and estate planning, including the "new" planning strategies in light of the legislation.

Registration opens at 7am

Session runs from 7:30am to 9:15am Q&A occasionally runs longer (2 CPE)

A buffet breakfast is provided, please arrive early to make your selections and find a seat prior to the session start.â€‹

March 25, 2020

CFO and Controllers SIG - TBD

Cordia Partners

8330 Boone Blvd

Vienna, VA 22182

07:30 AM - 09:00 AM EST

Bob Burkett,

bob.burkett@kineticcpagroup.com

Mark your calendars.

Specific details to follow.

May 12, 2020

Government Contracting SIG

Tower Club

8000 Towers Crescent Drive, Suite 1700

Tysons, VA 22182

07:00 AM - 09:30 AM EST

Details to follow.

Benefits: 1 hour of CPE, along with a breakfast buffet.

Time: Doors open at 7:00 AM, Speaker starts at 8:00 AM, done by 9:30 AM.

May 19, 2020

Chapter Meeting - Ethics 2020

Fairview Park Marriott

3111 Fairview Park Drive

Falls Church, VA 22042

03:00 PM - 08:30 PM EST

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page@ncvscca.org

Mark your calendars for the Ethics Training to be held on May 19.

Lori Roberts will be on hand to deliver the training.

Final meeting/time details to follow - this will be an evening event at the Fairview Park Marriott.

May 21, 2020

Non-Profit SIG - TBD

National Hospice & Palliative Care Organization

1731 King Street, Suite 100

Alexandria, VA 22314

08:00 AM - 09:30 AM EST

Brian Wendroff,

bjwendroff@wendroffcpa.com

Mark your calendar - details to follow.

July 14, 2020

Government Contracting SIG
Tower Club
8000 Towers Crescent Drive, Suite 1700
Tysons, VA 22182
07:00 AM - 09:30 AM EST
Details to follow.

Benefits: 1 hour of CPE, along with a breakfast buffet.

Time: Doors open at 7:00 AM, Speaker starts at 8:00 AM, done by 9:30 AM.

August 20, 2020

Non-Profit SIG - TBD
National Hospice & Palliative Care Organization
1731 King Street, Suite 100
Alexandria, VA 22314
08:00 AM - 09:30 AM EST
Brian Wendroff,
bjwendroff@wendroffcpa.com
Mark your calendars - details to follow.

September 15, 2020

Government Contracting SIG
Tower Club
8000 Towers Crescent Drive, Suite 1700
Tysons, VA 22182
07:00 AM - 09:30 AM EST
Details to follow.

Benefits: 1 hour of CPE, along with a breakfast buffet.

Time: Doors open at 7:00 AM, Speaker starts at 8:00 AM, done by 9:30 AM.

September 17, 2020

Non-Profit SIG - TBD
National Hospice & Palliative Care Organization
1731 King Street, Suite 100
Alexandria, VA 22314
08:00 AM - 09:30 AM EST
Brian Wendroff,
bjwendroff@wendroffcpa.com
Mark your calendar - details to follow.

October 22, 2020

Non-Profit SIG - TBD
National Hospice & Palliative Care Organization
1731 King Street, Suite 100
Alexandria, VA 22314
08:00 AM - 09:30 AM EST
Brian Wendroff,
bjwendroff@wendroffcpa.com
Mark your calendar - details to follow.

November 10, 2020

Government Contracting SIG
Tower Club
8000 Towers Crescent Drive, Suite 1700
Tysons, VA 22182
Details to follow.

Benefits: 1 hour of CPE, along with a breakfast buffet.

Time: Doors open at 7:00 AM, Speaker starts at 8:00 AM, done by 9:30 AM.

November 19, 2020

Non-Profit SIG - TBD
National Hospice & Palliative Care Organization
1731 King Street, Suite 100
Alexandria, VA 22314
08:00 AM - 09:30 AM EST
Brian Wendroff,
bjwendroff@wendroffcpa.com
Mark your calendar - details to follow.