

Introducing That 401(k) National Conference

By Ary Rosenbaum, Esq.

Over a year ago, I created a set of regional events called That 401(k) Conference. It was an idea that came out of my head after attending many regional and national events. I wanted something unique, something memorable, and something that wouldn't break the bank for the attendees and the plan providers sponsoring them. The goal was to eventually hold a national 401(k) conference. After 8 events held and more planned, it's time for That 401(k) Conference to go national with That 401(k) National Conference, emanating from Walt Disney World Swan on March 10-11, 2020 in Lake Buena Vista, Florida.

Why another National 401(k) event?

A plan provider can go broke attending every national 401(k) and retirement plan connected event. Whether the event is run by the national retirement plan industry organization or a national investment custodian, there are so many events out there that a plan provider doesn't really have the time attending every event. The difference between That 401(k) National Conference and some of the other events is that my event isn't a clone of what else is out there, it will stand out as a unique experience and event for those that will attend.

Something different, something memorable

One of the reasons I started the regional

events, That 401(k) Conference, was that I was looking at some of the regional events I've attended and spoken at. Many times, they would be at the local Sheraton or Marriott and the food they usually served wasn't something that was good, I would call it rubber chicken. If you throw an

my events at a baseball stadium (I added football stadiums to the mix), offer a tour of the venue, and bring in a former sports great for the event. So no matter what the advisor learned from the content provided by the plan provider sponsors, the advisor was going to remember that event for a very long time. Whether they met Dwight Gooden, Steve Garvey, Andre Dawson, or Wade Boggs, they will always remember the fun and memorable times they had at the event that I hosted. How many regional and national events you attended and the only thing you remember from it was the city that hosted it. With That 401(k) National Conference, you will remember the event for the content, the camaraderie, the athlete appearances (one each day), and for the venue.

A family-friendly venue

Many of the national conferences have an event in cities that I absolutely love: Las Vegas and San Diego come to mind. That 401(k) National Conference is emanating from Walt Disney World Swan because of the uniqueness of the venue and the fact that it offers a family-friendly atmosphere that most 401(k) centric events don't have. I know what happens in Vegas, stays in Vegas, but as a 47-year-old with a wife and two kids,

being away from home for a national conference for 2-3 days is a hardship for them since I do most of my work from home. I'm sure as a plan provider, you have that hardship as well. So this venue will allow you



event, make it memorable. So while developing my own idea for an event, I looked at inspiration from the Comic Cons and some of the baseball card/autographs shows that my son would drag me to. I decided to hold

to bring your spouse or significant other and your kids to a venue that no child or adult could turn down. With the conference scheduled for a Monday and Tuesday, that gives you the weekend and a couple of days before to go to Disney World. Through the conference, you will be able to purchase Disney World tickets at a substantial discount. Disney World has 4 theme parks and the new Star Wars Galaxy's Edge will be open by then. Being at a Disney property hotel allows you easier access to the parks and special access Magic Hours for earlier entry. So instead of two days at the conference, stay 5-6 days and there will be a discount Disney Swan hotel rate for those days including the conference. It will be easier for you and the household if you invite the household at That 401(k) National Conference.

Unique speakers and presentations

One of my jokes about many of the national events is that there seems to be a repetition of the speakers, that it's the same 5 people who speak. I don't know who these 5 speakers are, but let's just say that one of the drawbacks of some of the other events is that the voices heard in the presentations are repetitive and certainly not unique. I've always felt like an industry outsider, so expect presentations from some thought-provoking and unique retirement plan industry leaders, that you may not hear at other national and regional events. Unique presentations from unique voices in the retirement plan business will certainly be memorable.

Unique events

Conferences don't always have to be button down presentations from some of the industry's best, there will be plenty of time for some unique out of the box events. Like with my regional conferences, we will have an appearance each day from a former sports great where you can ask questions, get autographs, and take photos with them. We will book the athletes closer to the event date, but since it's Florida and in March, expect some names you know to meet. As for some other unique events, there be plenty

of networking time to meet our exhibitors and other



plan providers. As my late, great friend, Richard Laurita pointed to me, the retirement plan business is a relationship-driven business, so the people you meet at these networking times maybe a better use for your practice than any content presented. Our gang is busy at work with some fun and memorable sessions that may be a little different than you've seen in the past at other industry events.

Open to all retirement plan providers

Unlike the regional That 401(k) Conference whose audience are financial advisors, That 401(k) National Conference is open to all plan providers who wish to attend such as financial advisors, third party administrators (TPAs), and auditors. There will be enough interesting content for these providers as well as an exhibit area for our sponsors. If you work in the retirement plan industry, this is the event for you.

It won't break the bank

As discussed, you can go broke attending every national 401(k) related conference. I can guarantee you that you won't go broke attending or sponsoring That 401(k) National Conference. The attendance fee is \$500 (there is an early bird available of \$300) and there is a firm rate (including an early bird special too). As for the hotel, you can book directly with the discount rate is on the event signup page at <http://that401ksite.com/that-401k-conference-disney/> A link for the discount Disney tickets will be available when Disney sets the 2020 ticket rates. The top line sponsorship at That 401(k) National Conference will top at \$15,000 (with a substantial discount for previous That 401(k) Conference sponsors). No 6 figure conference sponsorships, no attendance fees that require a small loan. It's all about learning a thing or two in a friendly, laidback atmosphere at the happiest place in the world.

Sign up today

Sure, it's less than 10 months away, but the early bird rates and the reserved block of rooms won't last forever. Sign up today at <http://that401ksite.com/that-401k-conference-disney/>.

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