



*“Where Fun Meets 401(k)”*



# ATTENDEE BROCHURE

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# THE VENUE



Walt Disney World Swan, March 10-11, 2020

This sister of the Walt Disney World Dolphin Hotel employs the same modern design sensibilities with a nod to Renaissance elegance. Clamshell fountains and graceful twin swans preside over swaying palm trees, verdant lawns and the gleaming shores of Crescent Lake, while a wave motif with a coral-and-aqua color scheme embodies Florida's unique subtropical style.

Conveniently located in Disney's BoardWalk area, this hotel is within easy walking distance of Epcot—and is just a boat ride away from Disney's Hollywood Studios.

# WHERE FUN MEETS 401(K)



Las Vegas is great, so is San Diego, Nashville, New Orleans, Dallas, and any other city for a national 401(k) conference.

Disney World is the venue for the inaugural That 401(k) Conference because it's a unique and fun place. Getting to travel for conferences can put a burden on your spouse and your children. So with a family-friendly place, this might be the place to be to bring the spouse and children. With the conference taking place on Monday and Tuesday, it gives you the flexibility of being at the Disney Parks the days before the event including the weekend right before.

In 2020, Star Wars Galaxy's Edge at Disney Hollywood Studios will be open and that's just one theme park of 4 that is within walking, boating, and bus distance.



“

*If you make an event,  
make it memorable.*

”

**Ary Rosenbaum**

# DO WE REALLY NEED ANOTHER 401(K) CONFERENCE?

That's probably the first question that comes to mind when being approached with this brochure. Yes, there are many national conferences, but we feel that there is room for something unique.

The reason that I started the regional That 401(k) Conferences because I wanted to create an advisor event that was memorable and unique in atmosphere and setting. I offered events that were memorable because of where they held, meeting a former player, and allowing content from some truly worthwhile plan providers without breaking the back of the advisors attend and the plan providers that were kind enough to sponsor.



I've had the pleasure of attending a few national 401(k) event including opportunities to speak. They're great, but I want to offer an event at a fun, family friendly setting that won't break the backs of attendees (advisors, plan administrators, auditors) and won't break your bank as a plan provider. My top of the line sponsorship is way less than any other national event out there. Sure, it takes money to run an event of this magnitude, but the reason for this event and the regional events is to foster relationships with other plan providers.

## **Unique aspects of That 401(k) National Conference:**

One stage for all events. You speak, you get the entire room.

A meet and greet appearance from a former sports great on each day.

Exhibit rooms that will be well attended.

Discount Disney Swan rooms for days before and after the conference at \$250 a night.

Substantial discounts on Disney World park passes.

Maximum registration for the event is \$500.

We're not going to have the same 5 speakers that every event out there has, unique voices from the industry will be heard.

# BOTTOM LINE ON ATTENDANCE COSTS



Discount Walt Disney World Tickets will be available at substantial savings.

**Sign Up and Further Information Can Be Found  
at  
that401ksite.com**

**or more directly at:  
<http://that401ksite.com/that-401k-conference-disney/>**



# CONFIRMED SPEAKERS SO FAR



**Ary Rosenbaum**  
**The Rosenbaum Law Firm P.C.**

Who else where you expecting?

The World's Most Dangerous ERISA attorney (because of his frankness) will be there to host the festivities and throw in the occasional Airplane! and Caddyshack reference.



**The Retireholi(k)s**  
**Plan Design Consultantts**

When you think of viral 401(k) marketing, all you can think of is The Retireholi(k)s. Their video marketing is original and fun. They will bring the fun to 401(k) at That 401(k) National Conference with a special episode being filmed at the grand stage of That 401(k) National Conference.



**Dan Venturi**  
**401(k) Reboot**

Dan Venturi, co-host of That 401(k) Podcast and principal of 401(k) Reboot will give his insights on 3(16) services and payroll issues that plague 401(k) Plans.

## MORE TBA



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