

The Biggest Financial Decisions Facing Your Employees Thursday, September 27, 2018

Your employees have competing financial priorities and paychecks have to stretch further. Employees want to build the knowledge to make the right financial decisions but often don't know where to go for guidance or are overwhelmed by technical language.

In this session, you will learn more about how to support your employees' financial well-being. Topics will include:

- Evaluating major purchases;
- Planning for education expenses;
- Saving for retirement in a 401(k) plan;
- Social Security and Medicare;
- Insurance; and
- Basic estate planning.

Our Speakers

Jonathan M. McEvoy, CFP, Portfolio Manager, Access, Wealth Advisory Services at Johnson Investment Counsel

Jon joined Johnson Investment Counsel in 2011. He is a Portfolio Manager and holds the Certified Financial Planner (CFP®) designation. Before coming to the firm, he worked for Fidelity Investments building fixed-income portfolios for high net worth clients.

Jon graduated from Miami University with a B.S. Marketing and Entrepreneurship.

James C. Hunter, CFA, CFP, AIF, Portfolio Manager, Principal, Wealth Advisory Services at Johnson Investment Counsel

Jim came to Johnson Investment Counsel in 2000, and currently works as a Portfolio Manager in Financial Advisory Services in Cincinnati, Ohio. He holds the Chartered Financial Analyst (CFA), Certified Financial Planner (CFP®), and Accredited Investment Fiduciary (AIF®) designations. In Jim's first nine years at Johnson, he worked as an Equity Analyst.

James graduated from the University of Cincinnati with an M.B.A in Finance and a B.A. in Psychology.

Program Details

When: Thursday, September 27, 2018

Where: Ramada Plaza Cincinnati North (Sharonville)
11320 Chester Road
Cincinnati OH 45246

Parking: Free parking in the hotel parking lot

Time: 7:30 a.m. - 8:20 a.m. Networking, Registration, and Full Breakfast
8:20 a.m. - 8:30 a.m. Announcements
8:30 a.m. - 10:15 a.m. Program

To register for this program, visit us at www.gccba.com and click on programs