



SEPTEMBER LUNCHEON PROGRAM

“THE SHIFTING ADVICE LANDSCAPE (AND HOW TO SUCCEED IN IT)”

TUESDAY, SEPTEMBER 18, 2018

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

In a world where consumers can order transportation, movies, and even groceries online, how will they choose to receive financial advice? And what will those preferences mean for the individuals and traditional financial companies who wish to provide that advice? Bill McNabb, chairman and former CEO of the Vanguard Group, will show attendees how dramatically the landscape of financial advice has transformed in just a few decades. From modes of delivery to models of compensation, he will explain why firms that provide planning and advice can't afford to stand still. Most importantly, he will share Vanguard's perspective on how financial advice professionals can best position themselves for the future.

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP,
CPA (PA Only), PACE and CTFA will be offered.**

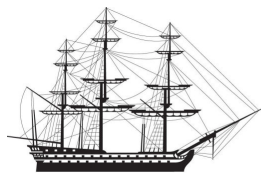
Speaker:

F. William McNabb III is chairman of Vanguard. He joined Vanguard in 1986. In 2008, he became chief executive officer; in 2010, he became chairman of the board of directors and the board of trustees. He stepped down as chief executive officer at the end of 2017. Earlier in his career, he led each of Vanguard's client-facing business divisions.

Mr. McNabb is active in the investment management industry and serves as the vice-chairman of the Investment Company Institute's board of governors; he was chairman from 2013-2016. He is chairman of board of the Zoological Society of Philadelphia and serves on the Wharton Leadership Advisory Board and the Dartmouth Athletic Advisory Board. He is also a board member of UnitedHealth Group, a board member of CECP: The CEO Force for Good, and a member of the Philadelphia School Partnership.

Mr. McNabb earned an A.B. at Dartmouth College and an M.B.A. at The Wharton School of the University of Pennsylvania.

This meeting is being sponsored by



Vanguard®

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

PHILADELPHIA ESTATE PLANNING COUNCIL • P.O. BOX 579 • MOORESTOWN, NJ 08057 • 215-486-6215
WWW.PHILAEPC.ORG • STAFF@PHILAEPC.ORG

**SEPTEMBER 18, 2018 LUNCHEON PROGRAM
REGISTRATION FORM**

Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
--------------	------	-------------	------

Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after September 14, 2018.

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$45 per person) Non-Member (\$65 per person)

Please select your lunch entrée:

Grilled Herbed Chicken Paillard, Wilted Spinach and Fingerling Potato, Roasted Pepper Chicken Jus

Campanelle Pasta, Charred Broccoli, Cacio E Pepe

Special Dietary Needs: _____

CONTINUING EDUCATION INFORMATION:

(Members: Add \$15 per credit • Non-Members: Add \$20 per credit)

Continuing Legal Education (1 credit).....Attorney ID: _____

Insurance Continuing Education (1 credit).....License Number: _____

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)