

# TRIANGLE BENEFITS FORUM

## MEETING AGENDA

TUESDAY, FEBRUARY 24, 2009

**Host:** John R. Cella, Jr., Manning, Fulton & Skinner, P.A.

**Location:** Manning, Fulton & Skinner, P.A.  
3605 Glenwood Avenue, Suite 500  
Raleigh, NC 27619-0389

**Speaker:** John Cella

**Topic:** "Roth IRAs"

1. Welcome

- a. Visitor(s)
- b. Newest Member(s)
- c. Members (Please update and/or check off routed roster.)

2. Today's Program

3. Round Table

4. Upcoming Meetings

a. Next Meeting

i. Tuesday, March 24 (4th Tuesday!) @ 3:45 p.m.

- 1. Topic – Benefits Past, Present & Future From The Eyes of HR
- 2. HR Panel
- 3. Location – Poyner & Spruill, LLP, RBC Center, Raleigh, NC  
27601

b. Other Upcoming Meetings

5. Other Items for Discussion

- a. Propose Scheduling all Meetings for Next Year on 4<sup>th</sup> Tuesday at 11:45a
- b. Officer Nominations for 2009-2010
  - i. President
  - ii. Vice President and Membership Chair
  - iii. Treasurer
  - iv. Chief Operating Officer

Enclosures (2)

- 1) *UPDATED* Schedule of Programs, 2008/2009 (*on back*)
- 2) COMPERIO on NBC-17 News

**From:** Jim Sotell [mailto:jrs@comperiorc.com]  
**Sent:** Monday, February 23, 2009 9:45 AM  
**To:** Morrison, Greg  
**Subject:** RE: COMPERIO to Appear on NBC-17 News Tonight


Greg  
The link below is the story that aired. Click on the link below

(fyi-there are two video clips (1) the clip with white house was what aired on the news, the other clip-my photo is the entire interview)

<http://orange.mync.com/site/Orange/news/story/27826/what-to-do-if-your-company-stops-401k-match/>

regards,  
James R. Sotell, AIF®  
Managing Director

COMPERIO RETIREMENT CONSULTING, Inc.

	<p><i>Unbiased Advice</i> <i>No Conflicts of Interest</i> <i>We Are a Fiduciary for your plan</i></p>	
<p><b>February 2009</b></p>	<p><b>News Interview</b></p>	<p><b>VOLUME 1 ISSUE 5</b></p>
<p><b>ARCHIVE</b></p>		
<p><b>Fiduciary &amp; Investment Outlook</b> January 21, 2009 Vol. 2 Issue 1</p>	<p>COMPERIO to Appear on NBC-17 News Tonight on February 20 at 6pm and 7pm</p>	
<p><b>Fiduciary &amp; Investment Outlook</b> October 24, 2008 Vol. 1 Issue 3</p>	<p>We wanted to make you aware that Jim Sotell was interviewed by Laura Barron, NBC-17 News in Raleigh Durham, and the interview will air tonight February 20 at 6pm and 7pm.</p>	
<p><b>Fiduciary &amp; Investment Outlook</b> July 24, 2008 Vol. 1 Issue 2</p>	<p>The interview discusses that some Employers have reduced or stopped their 401(k) match. The topic concerned whether employees should still participate and at what level?</p>	
<p><b>Fiduciary &amp; Investment Outlook</b> May 19, 2008 Vol. 1 Issue 1</p>	<p>Jim also provides perspective on how Employers are handling this difficult decision.</p>	
<p><b>USEFUL LINKS</b></p>		
<p>Website ComperioRC.com DOL-Fiduciary Education</p>	<p>Hope you can tune in.</p>	
<p><b>Contact Us</b></p>		