Morgan Stanley

THE KELLIHER CORBETT GROUP
AT MORGAN STANLEY

Building Better Retirement Plans:

A Virtual Workshop Series for Plan Sponsors

Please join Morgan Stanley for a virtual workshop series curated to help you deliver a best-in-class retirement program to your employees. Learn invaluable insights and thought leadership tailored specifically to the needs and interests of senior leadership members, investment committees, and finance and human resources professionals.

Click individual event title to register (or to request event materials from prior events)
All sessions will be held from 10:00 – 11:00 AM ET

April 2, 2025

Solving Non-Discrimination Testing Challenges with Innovative Plan Design

This workshop will explore the complexities of non-discrimination testing and ways you can navigate them as a plan sponsor. Learn about ADP/ACP, top-heavy tests, Safe Harbor 401(k) plans, as well as plan design strategies to simplify compliance, reduce/eliminate test failures, and enhance plan participation.

THE MAND MARBLESTONE GROUP — retirement plans redefined

FEATURED SPEAKER:

Brady Palmer
Regional Sales Director Northern New England
The MandMablestone Group

May 6, 2025

The Power of Benchmarking: Evaluating Costs and Features in Your Retirement Plan

Designing effective qualified retirement plans that meet the plan sponsor's objectives in a cost-effective way has become somewhat of a lost art. In this workshop, we'll explore why that is and discuss benchmarking essentials that can help you design the best plan for your employees.

Fiduciary Decision — Independent | Comprehensive | Actionable

FEATURED SPEAKER:

Tom Kmak
Co-Founder &Chief Executive Officer
Fiduciary Decisions & Insights

June 4, 2025

Fiduciary Excellence: Best Practices for Managing Retirement Plans

Are you a fiduciary? Are you sure? In this session, we'll cover everything you need to know as a fiduciary, including the key fiduciary responsibilities and who the plan fiduciaries are. We'll also discuss the consequences of fiduciary failure and ways you can reduce your risk and liability.

FEATURED SPEAKER:

John Doyle
Senior Retirement Strategist
Capital Group

September 9, 2025

Strengthening Plan Governance: Importance of the Investment Policy Statement & Committee Charter

Effective retirement plan governance is essential for mitigating risk, ensuring compliance, and improving participant outcomes. In this session, we'll explore the role of the Investment Policy Statement (IPS) and the Committee Charter in maintaining a well-structured and prudent retirement plan.

FEATURED SPEAKER:

Jennifer Kiffmeyer, JD
Chief Operating Officer
Retirement Learning Center

October 9, 2025

Attracting and Retaining Top Talent: A Guide to Executive Benefits & Non-Qualified Plans

In today's competitive job market, attracting and retaining top talent requires more than a strong salary and traditional benefits. In this session, we'll look at how executive benefits and non-qualified plans play a critical role in recruiting, rewarding, and retaining key employees, while also providing tax-efficient strategies for both employers and executives.

FEATURED SPEAKER:

Lori Simpson
Regional Vice President, NQ Plans
Principal

November 6, 2025

Morgan Stanley Retirement Plan Survey: Trends & Takeaways for Plan Sponsors

Staying ahead of industry trends is essential for plan sponsors looking to enhance their retirement plan offerings and meet evolving participant needs. In this session, we'll share and discuss the results of Morgan Stanley's latest retirement plan survey and the insights it revealed about plan sponsors' attitudes toward the topics most important to their plan.

FEATURED SPEAKER:

Franco LoFaro
Executive Director, Co-Head of Retirement |
Institutional Consulting Solutions
Morgan Stanley

THE KELLIHER CORBETT GROUP AT MORGAN STANLEY
serves as a dedicated and seasoned advocate, providing thoughtful investment advice and solutions tailored to their clients' unique goals. Founded in 1992, the team of fourteen investment professionals manages over $5 billion* in assets, offering a full suite of investment management and advisory services to individuals, families, corporations, and institutions. Clients of the Kelliher Corbett Group benefit from the scope, scale, and oversight of a global financial services firm coupled with the independence, objectivity, and individualized service capabilities of a boutique advisory and consulting group.
(*as of 7/31/2025)

4X Barron's Top 100 Institutional Consulting Teams in The Nation (2022-2025)

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CRC 4294178 03/2025 CS 1586840-5487819 09/25