



## AGC Southwest Chapters 401k Plan

AGC Houston • Louisiana AGC

# BAIRD

Join the largest AGC 401(k) plan in the nation with over 100 companies and \$300 million in assets.

- No longer trustee, plan administrator or named fiduciary, so liability associated with these functions is removed
- No individual company audit regardless of size
- No individual company 5500
- Still customize your plan options that set your company's plan apart: eligibility, matching, profit sharing, vesting, Safe Harbor, etc.

### Some of the 100+ companies already participating:



AGC Houston  
THE ASSOCIATED GENERAL CONTRACTORS OF AMERICA  
Quality People. Quality Projects.



For more information, please contact: Stephen Ellsworth, Robert Brann or Ginger Gray of Baird at 888-792-7650 or [mep@rwbaird.com](mailto:mep@rwbaird.com).



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Chapters 401k Plan**

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## **401(k) & FINANCIAL WELLNESS WEBINARS IN 2018**

We have 14 webinars to help you plan for retirement. We understand convenience is important and want to make it as easy as possible to help you achieve your retirement goals. The webinars are hosted by Transamerica and Baird Financial Advisors and are open to all employees of companies participating in the AGC Southwest Chapters 401(k) plan.

### **WEBINARS**

**All webinars will be live at 10:00 a.m. & 4:00 p.m. CST.**

#### **401(k) Plan Topics:**

**PLAN HIGHLIGHTS:** Get a detailed look at your investment options.

**YOUR RETIREMENT OUTLOOK:** Learn more about the planning tools on Transamerica's website.

**JOINING THE PLAN:** Learn why enrolling in your retirement plan is a smart move.

**INVESTING 101:** Learn the basics of investing.

#### **Financial Wellness Topics:**

**SAVING AND BUDGETING:** Learn why they're essential for a healthy financial future.

**BALANCING RETIREMENT AND COLLEGE:** Get details on available resources, how retirement accounts are viewed in the financial aid application process, and the differences between various college savings accounts like UGMAs/UTMAs, 529s and Coverdell accounts.

**SOCIAL SECURITY:** Learn how to maximize Social Security, how it will fit in your retirement strategy and important next steps if you are within five years of retirement.

**PLANNING FOR FAMILIES WITH SPECIAL NEEDS:** About 30% of U.S. families have at least one member with a disability. Learn how to tap support sources including government, nonprofits and private sectors.

**HEALTHCARE IN RETIREMENT:** Learn the "ABCDs" of Medicare and considerations if you plan to retire before 65 and get direction to resources for further help.

#### **R.S.V.P. REQUIRED**

To receive dial-in instructions for the webinars, contact Ginger Gray, Stephen Ellsworth or Robert Brann of Baird **888-792-7650** or [mep@rwbaird.com](mailto:mep@rwbaird.com).

**Check with your employer about onsite company meetings as well.**

#### **January 25, 2018**

- **INVESTING 101**
- **PLAN HIGHLIGHTS, YOUR RETIREMENT OUTLOOK & JOINING THE PLAN**

#### **February 22, 2018**

- **SAVING AND BUDGETING**
- **PLAN HIGHLIGHTS & YOUR RETIREMENT OUTLOOK**

#### **April 26, 2018**

- **BALANCING RETIREMENT AND COLLEGE**
- **PLAN HIGHLIGHTS & YOUR RETIREMENT OUTLOOK**

#### **June 28, 2018**

- **INVESTING 101**
- **PLAN HIGHLIGHTS, YOUR RETIREMENT OUTLOOK & JOINING THE PLAN**

#### **September 27, 2018**

- **SOCIAL SECURITY**

#### **October 25, 2018**

- **PLANNING FOR FAMILIES WITH SPECIAL NEEDS**
- **PLAN HIGHLIGHTS & YOUR RETIREMENT OUTLOOK**

#### **November 29, 2018**

- **HEALTHCARE IN RETIREMENT**



**Private Wealth  
Management**