



401(k) Summit

First Sound Bank.

Experienced. Innovative. Sound.

First Sound Bank is excited to report that our 401(k) Summit was a huge success! The event was well attended by clients and prospects alike. Understanding the fiduciary responsibilities associated with offering a 401(k) plan, as well as managing any associated risks were the main takeaways.

Presenters included: Shelby George, ERISA Attorney, Manny & Napier Advisors; Larry Shoemaker, Retirement Plan Consulting & Plan Administrator, Hunnex and Shoemaker, Inc.; Todd Moriarty, Regional Vice President, Transamerica Retirement Solutions, LLC; and Clint Boxman, Wealth Advisor, Latitude 48 Group, a Private Wealth Advisory Practice of Ameriprise Financial Services, Inc.

This was just the first of many events we plan to host as part of our strategic partnership with the wealth advisory firm Latitude 48 Group. For more information on, or an invitation to attend our next event, please contact Neeru Atreya at 206-436-2024.