Texas Criminal Defense Lawyers Association

# FINANCIAL FRIDAY

## Join us for a Financial Friday Livestream!

## FREE for Members | $75 for Non-Members

### Not a member? Join Here Today!

***Financial Fridays is a Member benefit and does not include CLE***

**When**: Friday, May 10, 2024

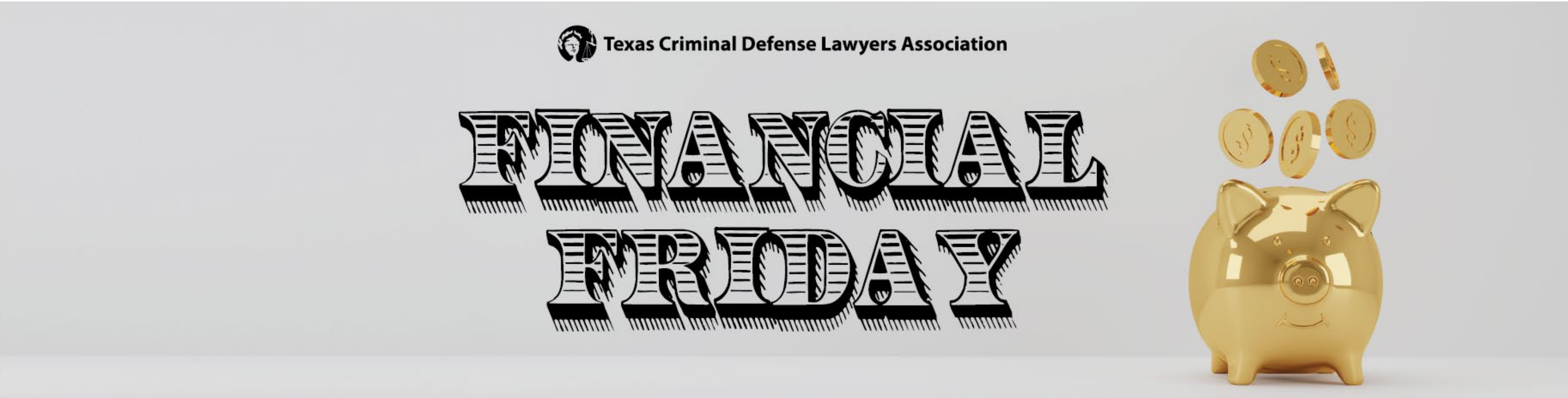
**Topic**: Secure 2.0: What Employers Need to Know About Changes to Retirement Plans

**Speaker**: Will Ham and Phuong

**Overview**: Join us for an insightful presentation as our seasoned attorney unveils the keys to successfully marketing a private law practice. Discover the art of understanding your target audience, building a robust online presence, mastering content marketing, and leveraging the power of networking and community involvement.

Will Ham has close to a decade of 401(k) and Investment Industry experience. Will began his career at John Hancock where he worked closely with businesses throughout Texas to efficiently and effectively manage their 401(k) plans. Following his time at John Hancock, Will worked at Fisher Investments helping High Net Worth investors with investment management and financial planning. What excites Will about going to work every day is working with people and helping them make better long-term financial decisions. Will earned his bachelor's degree in finance from Auburn University, where he met his wife Cameron. They have one child, Charley.

Phuong Jennings is well-versed in the area of qualified retirement plans, particularly when it comes to following IRS and DOL guidelines and regulations. For over 20 years, she has worked with financial advisors, CPAs and other trusted advisors helping their business clients in tax-deductible plan design and strategies within 401(k) plans, Defined Benefit/Cash Balance plans, 403(b) plans, Non-qualified plans etc. Phuong attained the Qualified 401(k) Administrator ("QKA") designation from American Society of




Pension Professionals & Actuaries (ASPPA) and continues to stay current with retirement plan design trends and regulatory compliance requirements. Phuong is passionate about helping people understand the complexity of these plans in an easy, understandable manner. This has allowed her to earn the trust of those she works with and has allowed her to become a “trusted advisor” to clients, advisors, partners and other business professionals.