



Comprehensive CalSavers Workshop:

What Every Business Owner Needs to Know About California's Mandated Retirement Plan Requirements

Key Topics:



What business owners with 1+ employees need to know about CalSavers



What are other options to consider (401k, Simple IRA, SEP IRA) in lieu of CalSavers.



Options for both new and old plans



What is a Financial Advisor and Third Party Administrators (TPA) role in this process



Host: Jon Benecke,
CFP®, CEPA®, AAMS™, CRPS™, MBA
Ameriprise Financial



Guest Host: Ken Roberts
Nicholas Pension Consultants

Workshop Details:



April 1, 2026



10-11:30AM



North State BIA | 1536
Eureka Rd., Roseville



Member - \$75
Non-Member - \$115

Contact: Evelyn Vanderville, evelyn@northstatebia.org