What SSF Owners Need to Know About Retirement Account Options for Themselves & Employees

Home Study Available

*Please contact **Ashley Staab** to receive the home study presentation and materials.*

Designed especially for solo-small firm owners, this 90-minute session focuses on the nuts and bolts of retirement account savings. Because SSF owners wear so many hats — legal practitioners, law firm owners, business managers, and administrators, taking the time to focus on current and future financial needs can end up low on the planning priority list. This home study will provide:

- SSF owners' insights into the broad range of retirement saving vehicles available to solo attorneys and SSF employers
- A basic understanding of the various account platforms available for retirement savings, for your own retirement or employees
- Information from the State of Colorado and Department of Treasury about the Colorado's Secure Savings Program, launching in 2023

Lori J. Miller is a Fiduciary Wealth Manager, Fee Financial Planner, Registered Principal, and Small Business Owner. Lori owns her own financial planning and advisement firm, which is affiliated with LPL Financial LLC and is currently 2022 President of the Colorado Financial Planning Association. Lori recently presented at the 2022 Solo Small Firm Institute on retirement savings accounts for solo and small law firm attorneys.

Anna Stevens is an Outreach Specialist for the Colorado Secure Savings at the Colorado Department of Treasury, State of Colorado, focusing on rural outreach. Prior to her current position, she worked as the Colorado Outreach Manager for Small Business Majority. She is a dual M.A./M.B.A. candidate in Political Science and Finance at the University of Colorado. During her free time, she enjoys being with her dog, hiking, and snowboarding

Free for SSF and Colorado W.O.L.F. members
$25 for non members.

Approved for 2 general CLE credits.