



July 31, 2009

To: Friends in the financial, legal, and accounting professions
From: Matthew D. Hutcheson, Independent Fiduciary
Re: Invitation to fiduciary training

Invitation

Please accept this invitation to join me for a two day fiduciary training session on the Campus of Boise State University in Boise Idaho September 24 and 25, 2009.

The training will be fast paced, and will include a mix of technical, philosophical, and practical fiduciary elements. The training is intended to help professionals become professional independent fiduciaries. In other words, it is professional independent fiduciary business training.

We will provide the insights needed to become the chief independent fiduciary over a retirement plan. There's more to serving in that capacity than can be discussed in this letter, which is why I have included some supporting dialogue that should clarify what this training is all about.

In 2007, I made the following statement to Congress:

“The matter of retirement plan economics is not only about dollars and cents; it’s also about *developing a growing population of responsible professional parties* who embrace correct principles and seek the common good of society. As an independent fiduciary without prejudice, that is precisely the lens through which I see things: The goal is to serve the best interests of nearly fifty million individual plan participants—not the self interests of the financial industry. Therefore, these thoughts and comments are offered to link dollars and cents with principles of fiduciary prudence.”

Now is the time to share the details of how my independent fiduciary practice works day-to-day, how I make decisions, who I choose to hire as investment advisors or legal counsel, and why.



LOYALTY



JUDGMENT



DECISION



EVALUATION



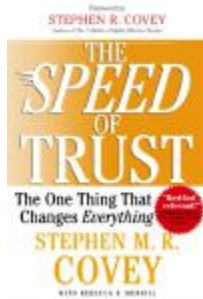
ACCOUNTABILITY

Those that are interested in learning what they need to know to become a member of that “growing population” of professionals will take with them the core knowledge and skills necessary to join that growing population of professional independent fiduciaries. When I say “fiduciary,” I mean to convey the “chief decision maker” over all aspects of plan management. In other words, the same role a CEO or CFO might ordinarily play in a conventional 401(k).

Times are changing, and employers find themselves wondering why they can’t hire someone to handle their plan. Of course they can, and you will be able to show them how and get paid well for it.

Over the next five years, it is quite possible that tens of thousands of qualified retirement plans will be governed by professional independent fiduciaries. The process of training that population of professional fiduciaries starts this September, at this training.

National leaders will participate in the training, including:



Stephen M. R. Covey



Scott Simon



**Mike Alfred
And
Ryan Alfred**

These and other nationally acclaimed fiduciary leaders will present powerful messages to help you become a leader in the 401(k) industry; ready to lead for the next 25 years. The training will be fast paced, intellectually stimulating, and most of all – immediately useful. You can return to your office and begin winning new clients that will be all too happy to pay you what you are worth for helping them.

You may also find the following links to two separate radio program interviews worth listening to. They lay the foundation or context for what an independent fiduciary does. The links are time sensitive and will expire in five days from today. If you receive this after the links have expired, please email me at matt@erisa-fiduciary and I'll send you a new link.

Radio Show Interviews

Radio show interview with Gary Allen & Matthew Hutcheson: [Parts I, II, III, and IV](#)

Radio show interview with Employee Benefit Advisor Podcast: [Entire EBA Interview](#)

What to do if you choose to join us

Complete the coupon at the bottom of the summary agenda invitation, and return it with your payment before August 31, 2009. August 1 to August 31, 2009 is an open participation period, meaning we will accommodate the attendance of that enroll by August 31.

(Those wishing to enroll after August 31, 2009 must receive special permission to attend and if permitted, will also be subject to a 50% post deadline tuition increase.)

RSVPs for groups of four or more attendees, coupled with tuition payments received prior to August 31, 2009, are entitled to a 25% discount and may recognize that discount when submitting payment.

We are looking forward to this event.

Sincerely,
Matthew D. Hutcheson

