

October 12, 2017

Date | Time | Location

“How to Attract and Retain Key Employees”

Presenter:

Marc Goldstein
 Marc Goldstein Associates Founder and CEO

Presentation Overview:

Attracting and retaining key employees in small and mid-size companies has become a major challenge in today’s environment. Discriminatory benefits can become a win-win situation for the key employee and the corporation.

Marc will discuss what strategies small and mid-size companies have incorporated into their benefit programs that large corporations have been using for years to attract and retain the key employees. In addition, learn strategies to leverage corporate dollars for your personal retirement needs using a tax efficient strategy.

About Our Presenter:



Marc Goldstein has been in the financial services industry for approximately thirty (30) years. In 1992, Marc established Marc Goldstein Associates, which assists, successful business owners, not-for-profit organizations, affluent individuals and small to medium size businesses with asset protection, wealth accumulation, wealth transfer and employee benefits planning.

Throughout Marc’s thirty years, he has been the recipient of numerous awards and has served on insurance company Agent Advisory Councils. He has been a guest lecturer, discussing relevant industry topics to peers and to clients. Marc has been a member of the esteemed Forum 400, Million Dollar Round Table, Court of the Table and Top of the Table for many years.

Marc has enjoyed close relationships with his clients. He has formed a team of CPAs, tax attorneys, estate planning attorneys, third party pension administrators and property and casualty insurance brokers, who understand the complex needs of his clients. The mission of his team is to achieve the client’s financial goals.

All of Marc’s clients have been by referral only. He has built his practice by hard work by concentrating on his client’s needs. The service Marc Goldstein Associates provides is second to none. The blanket statement “just call my office and we will handle everything” is Marc’s idea of service. His staff does whatever is necessary to achieve/assist with a client’s needs.

Marc lives in Harrison, New York with his wife, Beatriz, their daughters, Julia and Sofia and their dog, Kai. He has donated his time to enrich the lives of those less fortunate, has coached his daughters’ soccer teams and is an avid golfer.

THURSDAY
 October 12, 2017

12 noon to 2 pm
 Networking and Lunch

CXO Forum
 Presentation

Congressional Country
 Club
 8500 River Road
 Bethesda, MD 20817
 (301) 469-2000

For directions, visit
www.cxoforum.com

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