

## Please Join Us for a Seminar on **Independent School Executive Forum**

You are cordially invited to our breakfast seminar addressing financial and operational challenges facing Independent Schools. Speakers will address 403(b) plans, cash and endowment management and capital campaign accounting pitfalls. Our panel of capital project industry leaders will cover cost management, design, zoning and engineering best practices. This event is tailored for Independent School Headmasters, Chief Financial Officers, Human Resource Directors, Facility Directors and Board Leaders.

**Thursday, Oct 10, 2024**

**8 a.m. - 10:30 a.m.**

**Morgan Stanley**

2000 Westchester Avenue  
Purchase, NY 10570

Breakfast will be served

**RSVP by Oct 4, 2024 to  
Christian A. Templeman  
[christian.a.templeman@ms.com](mailto:christian.a.templeman@ms.com)**

**Speakers:**

Robert Cordero, CPA  
Partner, Independent Schools Leader  
PKF O'Connor Davies  
Topic: Capital Campaign Planning

**Speakers (cont)**

**Ali Powers**  
**Institutional Retirement Plans**  
*Nuveen / TIAA*  
Topic: *Market Outlook*

**Greg Torchiana**  
**External Sales Executive**  
*Vanguard*  
Topic: *The Value of Your Advisor*

**Andy Laskowski**  
**Retirement Plan Counselor**  
*American Funds*  
Topic: *Market Outlook*

**Sponsored by:**

American Funds, Nuveen and  
Vanguard

**Panelists:**

JD Summa, CEO / President  
KINGS Capital Construction  
Topic: Construction Management

David E. Gross AIA  
Executive / Founding Partner  
GF55 Architects  
Topic: Building Design Considerations

Anthony B. Gioffre, III, Esq.  
Managing Partner  
Cuddy & Feder LLP  
Topic : Land Use, Zoning + Development

Frank D'Eufemia  
Associate Principal / Vice President  
Langan  
Topic: Land Use Planning

**Hosted by:**

Christian A. Templeman, CRPC®, CRPS®, QPFC  
First Vice President, Financial Advisor  
Corporate Retirement Director  
Financial Wellness Director  
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