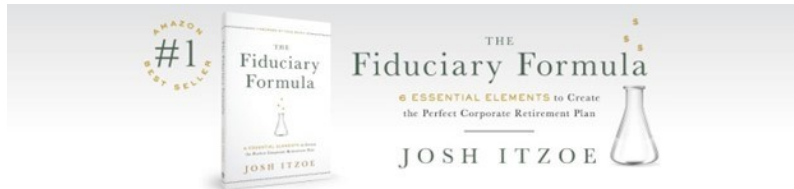


Invert Your Org Chart

Build A Company You Can Be Proud Of and A Culture Your People Will Love



CBMC Baltimore Metro North

Presents

Josh Itzoe

Founder | Fiduciary Expert | Best-Selling Author | Podcast Host

Christian Business Men's Connection



Josh will share some valuable business tips along with his faith journey.

Josh is the Founder & CEO of FiduciaryWor(k)s where he focuses on developing insights, research, technology, fiduciary consulting, and practice management coaching to assist retirement plan advisors and employers in the areas of fiduciary responsibility and workplace retirement.

Josh is also the creator of FiduciaryRx™ a web-based tool to help retirement plan advisors to diagnose, prescribe and improve Fiduciary Wellness™ for corporate retirement plans.

In addition, he is an Amazon Best-Selling author of two books - The Fiduciary Formula: 6 Essential Elements to Create the Perfect Corporate Retirement Plan and Fixing the 401(k): What Fiduciaries Must Know (And Do) to Help Employees Retire Successfully. Josh hosts the Fiduciary U™ Podcast, is a frequent industry speaker and has been quoted extensively in publications such as The Wall Street Journal, SmartMoney Magazine, Kiplinger's Retirement Report, InvestmentNews, PLANADVISER, and PLANSPONSOR.

Josh has been named a Financial Times Top 401 Retirement Advisor on three occasions (2016-2018) and was nominated for the Top 100 Most Influential People in Defined Contribution survey by 401kWire. He's a CERTIFIED FINANCIAL PLANNER™ professional and Accredited Investment Fiduciary®.

Josh was previously a Co-Founder, Partner & Chief Strategy Officer of Greenspring Advisors, one of the country's most well-known retirement plan consulting firms and the 2018 PLANSPONSOR Retirement Plan Adviser of the Year (Small Team). He launched the firm's corporate retirement practice and scaled it to \$4.5 billion in assets and serving 50,000 participants.

Josh earned a B.A. from Wake Forest University. He and his wife, Jessica, live in Phoenix, MD with their four children. When he's not creating new business ventures, he can be found on the sidelines cheering his kids on, playing golf, studying history, and woodworking.

Come and bring a friend!

Date & Time: Friday, September 16, 2022

Breakfast and Networking begins at 7:15AM, Program 7:30 to 8:30 AM

Place: Kelly Benefits, One Kelly Way, Sparks, MD 21152

Suggested Donation: \$10.00 **Reservations Requested:**

Please register online by Wednesday, September 14

scan QR code or go to www.cbmc.com/events

If questions, please contact Roger Yeager at rogeryeager@comcast.net
or (443) 250-4266



Kelly Benefits™