

Events

Wealth Management in a Retirement Plan Practice

EVENT START

December 13, 2022 2:00:00 PM

ATTORNEYS & PROFESSIONALS

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SOURCE

PLANADVISER

SERVICES

Retirement Services

- Financial Institutions & Advisers

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Groom principal [David Kaleda](#) will be joining *PLANADVISER* on December 13, 2022 at 2:00 p.m. ET, as part of its editorial Practice Progress series, to co-present the webinar, “Wealth Management in a Retirement Plan Practice.” The program will explore the trend in retirement plan advisory groups naming wealth management leaders to key roles and aggregator firms merging with wealth advisers as well as benefits advisers, and what’s behind the trend. Among this, also:

- Why wealth and retirement belong together—or do they?
- How wealth management can be fit into an advisory firm’s service offering
- How to approach revenue opportunities in wealth management

To learn more or to register, please [click here](#).