O'CONNELL
INSURANCE GROUP INC.

Summer 2010 Financial Education Workshop Schedule

All Events held at The O'Connell Insurance Group Offices from 7:00pm to 8:30pm
451 Street, Suite 101, Boston MA 02110

Thursday April 22nd Saving for Retirement: We will discuss appropriate savings rates and investment options (including 401(k)s, IRAs, and Roth IRAs). We will also cover Roth conversions and the special tax advantages available in 2010. Our goal is to ensure that you are aware and are taking full advantage of the opportunities open to you. *Guest Speaker, Justin Rohn, Vice President of Lord Abbett Investments.*

Tuesday May 18th Small Business Retirement Plans: A conversation specifically tailored to small business owners covering the pros and cons of various retirement plans available to a small business. Our objective is to ensure that your plan is cost efficient and maximizing the benefit for you, and your employees. *Guest Speaker: Bob McDermott, Senior Vice President with Putnam Investments.*

Thursday June 24th Beyond Investment Illusions: A town hall meeting where we will cover general investment concepts and strategies, with ample time reserved for questions and answers. Our focus is to provide a sound background from which informed investment decisions can be made. Bring your sense of humor and any questions you may have. *Guest Speaker: Andrew Olig, Regional Marketing Director, The Hartford Mutual Funds.*

Tuesday July 20th Women and Investing: Women account for 50 percent of the private wealth in America, and that percentage is steadily growing. The amount of private wealth that women control is projected to grow from $14 trillion today to $22 trillion by 2020. Come hear about some of the unique concerns that women have investing and strategies to better manage your wealth. *Guest Speaker: Mary Kralis-Hoppe, Vice President, AllianceBernstein Investments.*

Thursday August 19th Alternative Investments: Some of the largest collegiate endowments in the nation such as Harvard University and Yale University have significant allocations to alternative investments. Our discussion will cover alternative asset classes, potential opportunities, pitfalls, and the ability of the individual investor to access these investments. *Guest Speaker: Jeff Casale, Vice President, The Macquarie Group*

Tuesday Sept 21st Understanding Annuities: Annuities can be complicated and are often a misunderstood investment vehicle. Our conversation will focus on the different types of annuities, how they are best used within an investment portfolio for guaranteed lifetime income, and what to watch out for. *Guest Speaker, Laura Flemming, Regional Marketing Director, Lincoln Financial Services.*

Refreshments and light hors d'oeuvre will be served
Please RSVP to (617)399-9990 or via email at matt@oiginc.com