Burak Alpaslan, C(k)P®, CFP®, AIF®
Co-Founder & Partner
Vital Planning Group

Having earned the Accredited Investment Fiduciary (AIF®) designation, Burak is focused on working with retirement plan sponsors to help improve the overall health of their plan, such as increased plan participation, employee engagement and financial wellness by providing education and guidance on all aspects of a formal financial planning process.

As a full-service Financial Planner, he operates with his clients' best interests in mind. His customized solutions are designed for his clients and their employees to meet both their business and financial goals. He utilizes his in-depth financial industry experience, over 26 years, technology, and resources to serve his client's best interests.

To deliver on his promise of providing retirement plan optimization services, Burak has aligned himself with the Retirement Plan Advisory Group (RPAG), one of the retirement industry's leading retirement plan management platforms. Working with RPAG's comprehensive retirement plan analytical tools, he can provide plan sponsors and plan participants a retirement plan solution complete with Investment Analysis (including Target Date Funds Analysis), Fee Benchmarking, Plan Design, Plan Sponsor Education, Participant Education, Fiduciary Education, Financial Wellness Programs and ERISA Compliance.

Burak received his bachelor's degree in civil engineering at the internationally accredited Middle East Technical University (ODTU) and a master's degree in economics and finance from Hacettepe University in Ankara, Turkey.

Burak began his financial services career in 1995 at Global Corporate and Investment Bank of Citigroup in Zurich, Switzerland where he worked as the Assistant Country Financial Controller. In 1996, he was sponsored by Citigroup to join their team in New York City where he held several positions as an officer with Citigroup prior to starting his financial planning practice in 2004.

Burak is confident in his experience helping business owners create and manage retirement and benefits plans for themselves and their employees. He has the expertise to keep his client's plan compliant and on target.

Burak is licensed to sell insurance and securities in multiple states.
He is a registered representative of and offers securities, investment advisory and financial planning services through MML Investors Services, LLC, Member SIPC (www.sipc.org). Vital Planning Group LLC is not a subsidiary or affiliate of MML Investors Services, LLC or its affiliated companies. Supervisory address: 6 Corporate Drive, Shelton CT 06484. 203-513-6000.
Domiciled in NJ, CA Insurance Lic #0F10204

TPSU
THE PLAN SPONSOR UNIVERSITY

Ilyas Akbar, CPA, CFP®
Partner
Vital Planning Group

As a financial professional for Vital Planning Group, I assist individuals and businesses in the development and implementation of strategies to help meet their long-term financial objectives.

I obtained my Bachelor's Degree in Accounting at Syracuse University and hold a professional designation as a Certified Public Accountant (CPA). * Prior to joining Vital Planning Group I was in public accounting with KPMG LLP.

My educational background and professional experience have driven me to use a systematic approach in working with my clients to determine their financial goals and investment objectives. The next step is to create a strategy to address these goals and objectives. Then as a registered representative, I will recommend the appropriate products and services to execute the strategy. My goal is to empower my clients with the information they require to make sound financial decisions.

In my spare time I like to travel, exercise, and spend time with my family. I also serve as a mentor to high school students, and volunteer with a few youth based organizations.

*I do not provide accounting services in my capacity as a Financial Professional with Vital Planning Group.

I am licensed and registered to offer products and services in several states. Licenses and registrations will vary. Please contact this office for further information.

I am a registered representative of and offer securities and investment advisory services and financial planning through MML Investors Services, LLC. member SIPC (www.sipc.org). Vital Planning Group is not a subsidiary or affiliate of MML Investors Services, LLC, or its affiliated companies. 6 Corporate Drive,
Shelton CT 06484. 203-513-6000

Beth Allen – Speaker Bio

As the founding member of Allen Benefits Law – Beth Allen advises employers, plan sponsors, and benefits professionals on the legal obligations imposed by federal and state benefits-related laws.

Beth began her career as an investigator for the Dallas Regional Office of the DOL Employee Benefits Security Administration. In that role, she reviewed health and welfare and retirement plans for compliance with ERISA, and worked with employers, service providers and other regulatory agencies to bring employee benefit plans into compliance.

Upon leaving the DOL, Beth served as benefits compliance counsel at an international brokerage, where she provided compliance guidance to employer plan sponsors and benefits professionals. As benefits counsel, she researched and summarized state and federal regulatory issues, developed and updated compliance tools, contributed to compliance-centered publications, and trained benefits firm personnel and clients on benefits laws.

Beth holds a Bachelor of Arts in government from the University of Texas at Austin and a Juris Doctorate from Southern Methodist University Dedman School of Law. She is a member of the Dallas Bar Association, State Bar of Texas, and American Bar Association. She also holds the Certified Employee Benefits Specialist (CEBS) designation and serves as an online course instructor of the CEBS Directing Retirement Plans 1 (RPA1) course.

When she's not conferring with clients on employee benefits issues, Beth is enjoying her life in Plano, TX with her husband, Glenn, and three sons (Ja'Shaun, Michael, and Isaiah).