

Wes Stillman presenting at Shareholder Services national conference on April 27

March 7, 2017

Shareholder Services will be holding its annual conference for Independent Registered Investment Advisors to discuss timely practice management and technology topics. Wes's workshop session 'Managing Your Company's Security Policy' we'll provide useful insight and best practices including:

- Evaluating short terms needs vs long term goals
- Establishing vendor and project timelines to stay on schedule
- Lining up the right resources to guide you through the process
- Developing policies and procedures that are practical and enforceable
- Preparing for the unexpected by getting it right the first time
- Planning for the 'What If?' scenarios that can and will occur

For all the details on the conference, visit: <http://www.ssgconference.com>