

**Wednesday, April 10<sup>th</sup>, 2019**

9:00 a.m. to 3:00 p.m.

Location:

**University of Oregon**

School of Law – White Stag Block

70 MW Couch Street

**Portland, OR 97209**

White Room

Adjunct Lecturers Presenting:

**Randall Collis, C(k)P®**

**Casey McCright, C(k)P®**

Merrill Lynch

<b>The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> <b>Agenda</b>		
9:00 – 9:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:30 – 9:50	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:50 – 10:50	<b>Session 1</b>	<b>The Retirement Savings Conundrum</b> <i>Randall Collis, C(k)P – Merrill Lynch</i> <i>Casey McCright, C(k)P – Merrill Lynch</i>
10:50 – 11:05	<b>Break</b>	
11:05 – 11:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Fiduciary Risk &amp; Liability Management Strategies</b> <i>Greg Hodges – Newport Group</i>
11:50 – 12:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals: Ask the Experts</b> <u>Moderator:</u> <i>Randall Collis, C(k)P – Merrill Lynch</i> <u>Panelists:</u> <i>Michael Deferro, C(k)P – AllianceBernstein</i> <i>Owen Kiernan – MFS Investment Management</i> <i>Parker Thompson – Legg Mason</i> <i>Lori Zeman – Ascensus</i>
12:35 – 12:50	<b>Break</b>	<b>Pick up your Lunch</b>
12:50 – 2:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's DC Plans?</b> <b>What is Not Working in Today's DC Plans?</b> <u>Group Discussion Leaders:</u> <i>Michael Deferro, C(k)P – AllianceBernstein</i> <i>Connor Hartwell – Dreyfus</i> <i>Riley Horlacher – Janus Henderson Investors</i> <i>Jon Nicolazzo – American Funds</i> <i>Lori Zeman – Ascensus</i>
2:15 – 2:45	<b>Session 5</b>	<b>The Ideal DC Plan - <i>Interactive Discussion</i></b>
2:45 – 3:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>

*Agenda is Subject to Change*