

Tuesday, March 26th, 2019

8:00 a.m. – 2:00 p.m.

Location:

University of Memphis
FedEx Institute of Technology
365 Innovation Dr.
Memphis, TN 38152
Fishbowl (Room 203/205)

Adjunct Lecturer Presenting:

Walter Grant, C(k)P®
Aegis Retirement Group

| The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> Agenda | | |
|--|--------------------------------------|--|
| 8:00 – 8:30 | Breakfast / Registration | Registration & Sign-in |
| 8:30 – 8:50 | Introduction | Introduction to The Plan Sponsor University <i>Walter Grant, C(k)P – TPSU Adjunct Lecturer</i> |
| 8:50 – 9:50 | Session 1 | Outcome-based Retirement Education for Responsible Stewards <i>Walter Grant, C(k)P – Aegis Retirement Group</i> |
| 9:50 – 10:05 | Break | |
| 10:05 – 10:50 | Session 2 | Keynote Presentation Addressing the Elephant in the Room <i>Jonathan Young – American Funds</i> |
| 10:50 – 11:35 | Session 3 | Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Walter Grant, C(k)P – Aegis Retirement Group</i> <u>Panelists:</u> <i>Michael Dullaghan – Putnam Investments</i> <i>Vincent Iacono – OppenheimerFunds</i> <i>Casey McCarthy, C(k)P – American Century Investments</i> <i>Brendon Shea – T. Rowe Price</i> |
| 11:35 – 11:50 | Break | Pick up your Lunch |
| 11:50 – 1:15 | Session 4 (Working Lunch) | What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plans? <u>Group Discussion Leaders:</u> <i>John Kutz – LeggMason</i> <i>Jonathan Ricketts – Natixis Global Asset Management</i> <i>Kevin White – Empower Retirement</i> <i>Kevin Worack – Janus Henderson Investors</i> |
| 1:15 – 1:45 | Session 5 | The Ideal Plan - Interactive Discussion |
| 1:45 – 2:00 | Closing | The C(k)PF Designation and Closing Statements |
| <i>Agenda is Subject to Change</i> | | |