

**Thursday, October 6<sup>th</sup>, 2022**  
8:30 a.m. to 2:30 p.m.

Location:

**University of Maryland**  
**Samuel Riggs IV Alumni Center**  
Crist Executive Board Room  
College Park, MD 20742

Adjunct Lecturers Presenting:  
**Kim Cochrane & Eduardo Gimenez**  
Raffa Retirement Services, a division of HUB International

<b>Agenda</b> <b>The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 9:00	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:00 – 9:20	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:20 – 10:20	<b>Session 1</b>	<b>The Retirement Savings Conundrum</b> <i>Eduardo Gimenez &amp; Kim Cochrane – Raffa Retirement Services</i>
10:20 – 10:35	<b>Break</b>	
10:35 – 11:20	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Look Below the Surface</b> <i>Jonathan Young – American Funds</i>
11:20 – 12:05	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> Kim Cochrane – Raffa Retirement Services <u>Panelists:</u> <i>Glenn Godin – American Century</i> <i>Andrew Goeller – MassMutual</i> <i>Christina Pihos – PIMCO</i> <i>Justin Wilson, C(k)P – State Street Global Advisors</i>
12:05 – 12:20	<b>Break</b>	<b>Pick up your Lunch</b>
12:20 – 1:45	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Rick Rath – Invesco, James Polito, C(k)P – Nuveen, Patrick Campbell – American Funds, David Frost – OneAmerica</i>
1:45 – 2:15	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
2:15 – 2:30	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		