

Thursday, September 22nd, 2022

8:00 a.m. to 2:00 p.m.

Location:

Marquette University

Alumni Memorial Union

1442 W. Wisconsin Avenue

Milwaukee, WI 53233

Room 157 (Maamawi Abiwin Room)

Adjunct Lecturer Presenting:

Todd Barden, C(k)P®

Morgan Stanley

The Plan Sponsor University Agenda <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast / Registration	Registration & Sign-in
8:30 – 8:50	Introduction	Introduction to The Plan Sponsor University <i>Steff Chalk, C(k)P – The Plan Sponsor University</i>
8:50 – 9:50	Session 1	State of the Workplace - Financial Benefits Study <i>Todd Barden, C(k)P – Morgan Stanley</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation The Future of Retirement Demands Thinking Bigger <i>Ned McNally – State Street Global Advisors</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Todd Barden, C(k)P – Morgan Stanley</i> <u>Panelists:</u> <i>Tom Charon – American Funds</i> <i>Laura Gaynor – Transamerica Retirement Services</i> <i>Eric Milano – 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) Plan? <u>Group Discussion Leaders:</u> <i>Andy Humble – Cohen and Steers</i> <i>Matt Orozco – Empower Retirement</i> <i>Brandon Radach – John Hancock</i> <i>Marta Rodriguez – JP Morgan</i> <i>William Slimbaugh – Natixis Investment Managers</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		