

Tuesday, August 23rd, 2022
8:00 a.m. - 2:00 p.m.

Location:
University of North Carolina at Charlotte
Cone University Center – Room 210
9201 University Rd
Charlotte, NC 28223

Adjunct Lecturer Presenting:
Chris Thixton, C(k)P, QPA
Principal
Pension Consultants, Inc.

Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast / Registration	Registration & Sign-in
8:30 – 9:00	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:00 – 10:00	Session 1	Essential Retirement Plan Oversight <i>Chris Thixton, C(k)P – Pension Consultants, Inc.</i>
10:00 – 10:15	Break	
10:15 – 11:00	Session 2	Keynote Presentation Save More Tomorrow – Using Behavioral Finance to Help Drive Better Outcomes <i>Greg Poplarski – OneAmerica</i>
11:00 – 11:45	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Chris Thixton, C(k)P – Pension Consultants, Inc.</i> <u>Panelists:</u> <i>Chris Frank – John Hancock</i> <i>Gwen Mazzola, CPA – HoganTaylor LLP</i> <i>Greg Poplarski – OneAmerica</i> <i>Alexander Schmiesing – Macquarie Group</i>
11:45 – 12:00	Break	Pick up your Lunch
12:00 – 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?
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>		