

Tuesday, October 4th, 2022

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

Location:

Texas State University
Lyndon B. Johnson (LBJ) Student Center
109 Student Center Dr
San Marcos, TX 78666
3rd Floor, Room 3-14.1

Adjunct Lecturer Presenting:
Robert Fernandez & Jordan Curry
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	Presentation by the Adjunct Lecturer Understanding Your Fiduciary Responsibilities <i>Jordan Curry – Morgan Stanley</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Look Below the Surface <i>Sue Walton – American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Robert Fernandez – Morgan Stanley</i> <u>Panelists:</u> <i>Brandon Barber – Paycor</i> <i>Tiffany Lauer – CUNA Mutual</i> <i>Jerry Lopez – John Hancock</i> <i>John Resurreccion – Dimensional Fund Advisors</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>Cameron O'Hala – Voya Financial, Rory Camardello – Goldman Sachs</i> <i>Michael Demler – Invesco, Charles Kruger – Baron Capital Group</i> <i>Eric Brey – Franklin Templeton, Brandon Helms – Columbia</i> <i>Threadneedle, George Williams – Nationwide, Paul McDonald –</i> <i>Empower Retirement</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>		