

Virtual TPSU Program

Thursday, February 3rd, 2022

8:30 a.m. - 12:00 p.m. PT

Adjunct Lecturer Presenting:
Schuyler Mann, C(k)P®
Managing Director
Retirement Wellness Group

Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 8:50	Introduction	Introduction to The Plan Sponsor University <i>Steff Chalk, C(k)P – The Plan Sponsor University</i>
8:50 – 9:35	Session 1	Building Retirement Readiness in the Pandemic Era <i>Schuyler Mann, C(k)P – Retirement Wellness Group</i>
9:35 – 9:45	Break	
9:45 – 10:30	Session 2	Keynote Presentation Look Below the Surface <i>Jonathan Young – American Funds</i>
10:30 – 11:15	Session 3	Panel Discussion with Industry Professionals: <u>Moderator:</u> <i>Schuyler Mann, C(k)P – Retirement Wellness Group</i> <u>Panelists:</u> <i>Tom Burns – Premier Plan Consultants</i> <i>Murray Cleaner, C(k)P – MassMutual</i> <i>Scott Harrison – Securian</i> <i>Ryan Nixon – Fisher Investments</i>
11:15 – 11:25	Break	
11:25 – 11:50	Session 4	The Ideal Plan – <i>Interactive Discussion</i>
11:50 – 12:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		