

Virtual TPSU Program

Wednesday, September 15th, 2021

8:30 a.m. - 12:00 p.m. Pacific Time

Adjunct Lecturer Presenting:
Daniel Dodgen
MassMutual Greater Pacific

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	Fiduciary Oversight and Governance <i>Daniel Dodgen – MassMutual Greater Pacific</i> <i>Adam Eisen – CAVU Business Management</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>Daniel Dodgen – MassMutual Greater Pacific</i> <u>Panelists:</u> <i>Michael Deferro, C(k)P – AllianceBernstein</i> <i>Scott Harrison – Securian Financial</i> <i>Dan Hemberger – Putnam Investments</i> <i>Emily Vincent – Douglas M. Farr & Company</i>
11:15 – 11:25	Break	
11:25 – 11:50	Session 4	The Ideal Plan – Interactive Discussion
11:50 – 12:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		