

## Virtual TPSU Program

Tuesday, July 21<sup>st</sup>, 2020

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

Adjunct Lecturer Presenting:

**Daniel R. Bryant**

*President, National Sales, Retirement and Private Wealth*  
**Sheridan Road Financial, a division of HUB International**

<b>Agenda</b> <b>The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 8:50	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:50 – 9:35	<b>Session 1</b>	<b>Managing Your Retirement Plan: A Fiduciary Handbook</b> <i>Daniel Bryant – Sheridan Road Financial</i>
9:35 – 9:45	<b>Break</b>	
9:45 – 10:30	<b>Session 2</b>	<b>Keynote Presentation</b> <b>The Blue Zones are Coming!</b> <i>Ned McNally – State Street Global Advisors</i>
10:30 – 11:15	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals: State of the DC Market</b> <b>Moderator:</b> <i>Daniel Bryant – Sheridan Road Financial</i> <b>Panelists:</b> <i>Mark Kirchner – Transamerica</i> <i>Eric Milano – T. Rowe Price</i> <i>Greg Schneider – First Eagle Funds</i> <i>David Waters – Franklin Templeton</i>
11:15 – 11:25	<b>Break</b>	
11:25 – 11:50	<b>Session 4</b>	<b>The Ideal Plan – Interactive Discussion</b>
11:50 – 12:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		