

Virtual TPSU Program

Thursday, October 7th, 2021

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

Adjunct Lecturer Presenting:

Colin Clark, C(k)P®

Senior Vice President, Retirement

Washington Financial Group, a division of HUB International Mid-Atlantic Inc.

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	The Retirement Savings Conundrum <i>Colin Clark, C(k)P and Elena Peerson, C(k)P – Washington Financial Group</i>
9:35 – 9:45	Break	
9:45 – 10:30	Session 2	Keynote Presentation Authentically Connecting with Women Investors <i>Jean Dunn – T. Rowe Price</i>
10:30 – 11:15	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Tom Leverone, C(k)P – Washington Financial Group</i> <u>Panelists:</u> <i>Marina Edwards – Invesco</i> <i>Lauren McCarty – American Century</i> <i>Jeanetta Skorzewski – PIMCO</i> <i>Jeremy Welsh – HUB International</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>		