

Virtual TPSU Program

Wednesday, September 23rd, 2020

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

Adjunct Lecturer Presenting:

Daniel R. Bryant

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

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	Managing Your Retirement Plan: A Fiduciary Handbook <i>Daniel Bryant – Sheridan Road Financial</i>
9:35 – 9:45	Break	
9:45 – 10:30	Session 2	Keynote Presentation 3(16): What’s in a Provider? How to Ensure Adequate Coverage and Value <i>Chris Weekley – The Standard</i>
10:30 – 11:15	Session 3	Panel Discussion with Industry Professionals: State of the DC Market <u>Moderator:</u> <i>Daniel Bryant – Sheridan Road Financial</i> <u>Panelists:</u> <i>Katherine Lee – HUB International</i> <i>John Kutz – Franklin Templeton</i> <i>Ernie Lopez – Ivy Investments</i> <i>Ryan Schutty – Principal Funds</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>		