

**Thursday, October 26<sup>th</sup>, 2023**

8:00 a.m. to 2:00 p.m.

Location:

**The College of New Jersey**

Brower Student Center

2000 Pennington Road

**Ewing Township, NJ 08628**

2<sup>nd</sup> Floor Room 225 West

Adjunct Lecturer Presenting:

**Michael Pallozzi, AIF®, CPFA**

*President / CFO*

**HFM Investment Advisors**

**Agenda – The Plan Sponsor University**

*The C(k)PF / The Certified 401(k) Plan Fiduciary Designation*

8:00 – 8:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
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 – 9:50	<b>Session 1</b>	<b>Behavioral Finance, Retirement Readiness, Participant Outcomes</b> <i>Michael Pallozzi – HFM Investment Advisors</i>
9:50 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Employer Sponsored Retirement Plans &amp; Updates to SECURE Act 2.0</b> <i>Chrissy DeCaria &amp; Joe Boyle – BPAS (Benefit Plans Administrative Services)</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Tyler Reedman – HFM Investment Advisors</i> <u>Panelists:</u> <i>Brian Beloin – The MandMarblestone Group</i> <i>William Smitheman – Baratz &amp; Associates CPA</i> <i>Matt Vanaman – PIMCO</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch - Sponsored by First Ascent Asset Management</b>
11:50 – 1:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Craig Pagano – Empower Retirement</i> <i>Giovanni Petronelli – T. Rowe Price</i> <i>Tyler Reedman – HFM Investment Advisor</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		