

**Thursday, November 2<sup>nd</sup>, 2023**

8:30 a.m. to 2:30 p.m.

Location:

**George Mason University**

Student Center – The Hub

4400 Rivanna River Way

**Fairfax, VA 22030**

HUB Meeting Room 3-5

Adjunct Lecturer Presenting:

**Colin Clark, C(k)P®**

*Senior Vice President, Retirement*

**HUB Retirement and Wealth Management**

**Agenda - The Plan Sponsor University**

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

8:30 – 9:00	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:00 – 9:20	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Colin Clark, C(k)P – HUB Retirement &amp; Wealth Management</i>
9:20 – 10:20	<b>Session 1</b>	<b>The Next Level Fiduciary – What you can do as a Plan Sponsor to Help Your Employees Get Retirement Ready</b> <i>Colin Clark, C(k)P – HUB Retirement &amp; Wealth Management</i>
10:20 – 10:35	<b>Break</b>	
10:35 – 11:20	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Enhanced Plan Design – Changing the Conversation</b> <i>Felix Okwaning – Principal Financial Group</i>
11:20 – 12:05	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> Tom Leverone, C(k)P – HUB Retirement & Wealth Mgmt <u>Panelists:</u> <i>Heather Bailey – State Street Global Advisors</i> <i>Diane Improta – SEI</i> <i>Linda Kurz – Transamerica</i> <i>Todd Mann – AllianceBernstein</i>
12:05 – 12:20	<b>Break</b>	<b>Pick up your Lunch</b>
12:20 – 1:45	<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>Michael Andrulis – Putnam, Andy Cunningham – MassMutual</i> <i>Dan Jess – American Funds, Ruben Gonzalez – Janus Henderson</i> <i>Timothy Harkleroad – Amundi Pioneer</i>
1:45 – 2:15	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
2:15 – 2:30	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		