

Virtual TPSU Program

Thursday, November 2nd, 2023

8:30 a.m. - 12:00 p.m. Eastern Time

Adjunct Lecturer Presenting:
Zachary Golen, C(k)P®
Broad Street Financial

Agenda

The Plan Sponsor University

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

8:30 – 8:50	Introduction	Introduction to The Plan Sponsor University <i>Andy Kelleher – The Plan Sponsor University</i>
8:50 – 9:35	Session 1	Presentation by the Adjunct Lecturer Cybersecurity <i>Zachary Golen, C(k)P – Broad Street Financial</i>
9:35 – 9:45	Break	
9:45 – 10:30	Session 2	Keynote Presentation Your Money Story – Behavioral Finance <i>Kathleen Burns Kingsbury – KBK Wealth Connection</i>
10:30 – 11:15	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Zachary Golen, C(k)P – Broad Street Financial</i> <u>Panelists:</u> <i>Javier Bermudez – T. Rowe Price</i> <i>Kyle Twiggs – Goldman Sachs</i> <i>Matt Leeper – American Funds</i> <i>Christopher McAvoy – PIMCO</i>
11:15 – 11:25	Break	
11:25 – 11:50	Session 4	The Ideal Plan – <i>Interactive Discussion</i>
11:50 – 12:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		