

Thursday, November 30th, 2023

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

Location:

DeSales University

DeSales University Center

2755 Station Avenue

Center Valley, PA 18034

Commonwealth Room

Adjunct Lecturers Presenting:

Brendan Speers, C(k)P®

Partner | Director of Retirement Plan Services

Legacy Planning Partners

The Plan Sponsor University – Agenda <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast / Registration	Registration & Sign-in
8:30 – 8:50	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:50 – 9:50	Session 1	Presentation by the Adjunct Lecturers Fiduciary Fundamentals – Balancing Roles, Responsibilities and Risk <i>Brendan Speers, C(k)P – Legacy Planning Partners</i>
	Break	
10:05 – 10:50	Session 2	Keynote Presentation Continued Progress Through Partnership – 2023 Defined Contribution Plan Sponsor Survey Findings <i>Alexandra Nobile – JP Morgan</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brendan Speers, C(k)P – Legacy Planning Partners</i> <u>Panelists:</u> <i>James Hakewill – MFS Investment Management</i> <i>Matt Leeper – American Funds</i> <i>Matt Vanaman – PIMCO</i> <i>Jim Wojciak – Federated Hermes</i>
11:35 – 11:50	Break	Pick up your Lunch
11:50 – 1:15	Session 4 (Working Lunch)	What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plan? <u>Group Discussion Leaders:</u> <i>Conni King – Legacy Planning Partners</i> <i>Robert Lee – JP Morgan</i> <i>Matt Vanaman – PIMCO</i> <i>Jim Wojciak – Federated Hermes</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements

Agenda is Subject to Change