

Virtual TPSU Program

Tuesday, December 12, 2023

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

Adjunct Lecturer Presenting:
Robert Lockery
Ganim Financial

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>Fred Barstein – The Plan Sponsor University</i>
8:50 – 9:35	Session 1	Presentation by the Adjunct Lecturer Retirement Readiness, Participant Outcomes <i>Robert Lockery – Ganim Financial</i>
9:35 – 9:45	Break	
9:45 – 10:30	Session 2	Keynote Presentation Misbehavin' in Retirement Plans – It's Time to Retire That Thinking Practical Strategies in Plan Design and Education from Behavioral Finance Jonathan Young – American Funds
10:30 – 11:15	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Robert Lockery – Ganim Financial</i> <u>Panelists:</u> <i>Liam Grubb – Franklin Templeton</i> <i>Robert Hunt – Fidelity Investments</i> <i>Giovanni Petronelli – T. Rowe Price</i> <i>Robert Pysk – Principal Financial Group</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>		