

Tuesday, February 13th, 2024
8:30 a.m. to 2:30 p.m.

Location:

George W. Bush Presidential Center
SMU Campus – Cabinet Room
2942 SMU Boulevard
Dallas, TX 75205

Adjunct Lecturer Presenting:
George W. Lollis
Managing Partner/Founder
Fiduciary 401(k)

Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 9:00	Breakfast / Registration	Registration & Sign-in
9:00 – 9:20	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:20 – 10:20	Session 1	Presentation by the Adjunct Lecturer Fiduciary Best Practices <i>George Lollis – WealthVisory Fiduciary 401(k)</i>
10:20 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation What Plan Sponsors Value Most <i>Katelyn Boone, C(k)P – Fidelity Investments</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>George Lollis – Fiduciary 401(k)</i> <u>Panelists:</u> <i>Brendan Helms – Columbia Threadneedle Investments</i> <i>Amanda Lewis – BlackRock</i> <i>Jordan McCann – Lord Abbett & Co</i> <i>Adam Whitehead – American Funds</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	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>Todd Champney – Empower, Wendell Epps – Principal Financial</i> <i>Kyle Kunder – TIAA, Sam Lee – VOYA, Eric Magyar – Janus Henderson</i> <i>Sean Maschler – American Century, Skyler Minery – JP Morgan</i>
1:45 – 2:15	Session 5	The Ideal Plan - Interactive Discussion
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		