

Thursday, February 8th, 2024

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

Location:

Serendipity Labs - Conference Center

100 North Point Center

Encore Conference Room

Alpharetta, GA 30022

Adjunct Lecturer Presenting:

Shelly Horwitz

Managing Director

Pensionmark

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	Challenges and Fears Facing Plan Sponsors <i>Shelly Horwitz – Pensionmark</i>
10:20 – 10:35	Break	
10:35 – 11:20	Session 2	Panel Discussion with Clients <u>Moderator:</u> <i>Rob Appleman – Pensionmark</i> <u>Panelists:</u> <i>Diane Beams – Thompson, O'Brien, Kappler & Nasuti</i> <i>Ayla Carswell – Shepard Exposition</i> <i>Chris Montag – Catalyst Tech Ventures, LLC</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>James Vanke – Pensionmark</i> <u>Panelists:</u> <i>Jason Butler - T. Rowe Price</i> <i>Scott Caloway - JP Morgan</i> <i>Brandon Helms - Columbia Threadneedle</i> <i>Nina Hollowell - Fidelity Investments</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>Matt Bartch - BlackRock, Dru Girard - Guggenheim Investments</i> <i>Chris Minton - Federated Hermes, Miller Peer - Empower Retirement</i> <i>Ray Rodriguez - Fidelity Investments, Chris Weekly - The Standard</i>
1:45 – 2:15	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		