

**Tuesday, March 19<sup>th</sup>, 2024**

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

Location:

**Texas State University**

LBJ Student Center

109 Student Center Drive

**San Marcos, TX 78666**

LBJSC room 3-14.1

Adjunct Lecturer Presenting:

**Noe Lopez, C(k)P®**

*Senior Vice President*

**Frost Wealth Advisors**

**Agenda - The Plan Sponsor University**

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

8:00 – 8:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
8:30 – 8:50	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan sponsor University</i>
8:50 – 9:50	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>Fiduciary Focus</b> <i>Noe Lopez, C(k)P – Frost Wealth Advisors</i>
9:50 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Visualize Retirement: From Vision to Reality</b> <i>Stuart Ritter, CFP – T. Rowe Price</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Noe Lopez, C(k)P – Frost Wealth Advisors</i> <u>Panelists:</u> <i>Katelyn Boone, C(k)P – Fidelity Investments</i> <i>Joe Long – BPAS Workplace Retirement Plans</i> <i>Paul McDonald – Empower</i> <i>Dan Sehn – Vanguard</i> <i>Frank Tighe – American Century</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch</b>
11:50 – 1:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is <i>Not</i> Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Rhea Berglund – Consider Tomorrow, Yvette Deming – Isolved</i> <i>Todd Leszczynski – Dimensional Fund Advisors, Yen Nguyen – Ascensus</i> <i>Mark Murphy – Fidelity Investments, Robert Wood – Nuveen</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - <i>Interactive Discussion</i></b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>

*Agenda is Subject to Change*