

Thursday, March 21st, 2024

9:00 a.m. to 3:00 p.m.

Location:

Fordham University School of Law

150 W 62nd St

New York City, NY 10023

Bateman Room

Adjunct Lecturer Presenting:
Burak Alpaslan, C(k)P®, CFP®, AIF®
Vital Planning Group

Agenda - The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	Breakfast / Registration	Registration & Sign-in
9:30 – 9:50	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:50 – 10:50	Session 1	Presentation by the Adjunct Lecturer The Role of the Retirement Plan Advisor <i>Ilyas Akbar – Vital Planning Group</i>
10:50 – 11:05	Break	
11:05 – 11:50	Session 2	Keynote Presentation How to Audit Proof Your Retirement Plan <i>Beth Allen – ERISA Attorney and former DOL Auditor</i>
11:50 – 12:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Ilyas Akbar – Vital Planning Group</i> <u>Panelists:</u> <i>Mark Cywin – Transamerica</i> <i>Jason Carlough – American Funds</i>
12:35 – 12:50	Break	Pick up your Lunch
1:50 – 2:15	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>Carlin Champion, C(k)P – MFS Investment Management</i> <i>Monica Elvira – T. Rowe Price</i> <i>Liam Grubb – Franklin Templeton</i> <i>Jamie Lagarce – Fidelity Investments</i> <i>Justin Muni – J.P. Morgan</i>
2:15 – 2:50	Session 5	The Ideal Plan - Interactive Discussion
2:50 – 3:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		