

**Tuesday, March 12<sup>th</sup>, 2024**

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

Location:

**Frederick Community College**

7932 Opossumtown Pike

**Frederick, MD 21702**

**Conference Room E126AB**

Adjunct Lecturer Presenting:

**Kim Cochrane & Eduardo Gimenez**

**Raffa Retirement Services, a division of HUB International**

**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>Ed Gimenez – HUB International</i>
8:50 – 9:50	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>Balancing Fiduciary Duties and Financial Wellness: The Pillars of a Perfect Retirement Plan</b> <i>Kim Cochrane – HUB International</i>
9:50 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Misbehavin' in Retirement Plans – It's Time to Retire That Thinking</b> Practical Strategies in Plan Design and Education from Behavioral Finance <i>Jennifer Miller – American Funds</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Ed Gimenez – HUB International</i> <u>Panelists:</u> <i>David Norris – T. Rowe Price</i> <i>Dave Sargent – BlackRock</i> <i>David Trapper – OneAmerica</i> <i>Justin Wilson, C(k)P – State Street Global Advisors</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 Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Nancy Gerstner – Franklin Templeton, Daniel Kretz – Voya Financial</i> <i>Chris Persak – Principal Financial Group, James Polito, C(k)P – Nuveen</i> <i>Jarrad Smith – Fidelity Investments, Chad Stewart – John Hancock</i> <i>Matt Vanaman – PIMCO</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		