

Wednesday, April 17th, 2024

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

Location:

Drake University
Olmsted Center
2875 University Ave
Des Moines, IA 50311
Parents Hall South

Adjunct Lecturer Presenting:

Brian Thompson C(k)P®

Founder & President

RockWay Wealth Partners

The Plan Sponsor University – Agenda <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast / Registration	Registration & Sign-in
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:55 – 9:55	Session 1	Presentation by Adjunct Lecturer Secure 2.0 Beyond Retirement – Convergence of Work, Retirement and Benefits at the Workplace <i>Brian Thompson, C(k)P – RockWay Wealth Partners</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Target Date Funds and/or Managed Accounts? <i>Jonathan Dues - Fisher Investments Institutional Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brian Thompson, C(k)P – RockWay Wealth Partners</i> <u>Panelists:</u> <i>Gabe Chamberlin – Transamerica & ARS Retirement Income Solutions</i> <i>Cindy Lande, JD, ERISA Attorney – Brown Winick</i> <i>Kelsey Parker, Auditor – FORVIS</i>
11:35 – 11:50	Break	Pick up your Lunch
11:50 – 1:15	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>Kyle Faaborg – Qualified Plan Consultants</i> <i>Susan Hagerman – RockWay Wealth Partners</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		