

Thursday, June 13th, 2024

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

Location:

DeSales University

DeSales University Center

2755 Station Avenue

Center Valley, PA 18034

Commonwealth Room

Adjunct Lecturers Presenting:

Brendan Speers, C(k)P®

Partner | Director of Retirement Plan Services

Legacy Planning

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 the Adjunct Lecturers Utilizing your 401(k) Plan to Recruit, Retain & Reward <i>Brendan Speers, C(k)P – Legacy Planning</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Using Data to Uncover Drivers of Retirement Readiness <i>Alexandra Nobile – J. P. Morgan Asset Management</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brendan Speers, C(k)P – Legacy Planning</i> <u>Panelists:</u> <i>Conni King – Legacy Planning</i> <i>Zachary Lindsay – MFS Investment Management</i> <i>Katie Riley – Fidelity Investments</i> <i>Lauren Zappia – American Funds</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>Andrew Kalinchak – Vanguard</i> <i>Robert Lee – J. P. Morgan</i> <i>Matthew May – Fidelity Investments</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>		