

Tuesday, June 11th, 2024

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

Location:

Rutgers University Inn and Conference Center

178 Ryders Lane

New Brunswick, NJ 08901

RUICC Conference Room A

Adjunct Lecturer Presenting:

Michael Pallozzi, AIF®, CPFA

President / CFO

HFM Investment Advisors

Agenda – The Plan Sponsor University

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

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	Adjunct Lecturer Presentation How do you Know your Plan is Healthy? <i>Michael Pallozzi – HFM Investment Advisors</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Employer Sponsored Retirement Plans & Updates to SECURE Act 2.0 <i>Chrissy DeCaria – BPAS (Benefit Plans Administrative Services)</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Jason Gabrieli – HFM Investment Advisors</i> <u>Panelists:</u> <i>Brian Beloin – The MandMarblestone Group</i> <i>Monica Elvira – T. Rowe Price</i> <i>Brian Kearney – July Business Services</i> <i>William Smitheman – Baratz & Associates</i> <i>Matt Vanaman – PIMCO</i>
11:35 – 11:50	Break	Pick up your Lunch (<i>sponsored by First Ascent Asset Management</i>)
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>Craig Pagano – Empower Retirement</i> <i>Tyler Reedman – HFM Investment Advisor</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements

Agenda is Subject to Change