

Tuesday, May 7th, 2024

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

Location:

University of South Florida
Marshall Student Center – Room 2709
4202 E. Fowler Ave
Tampa, FL 33620

Adjunct Lecturer Presenting:

Brent Sheppard

Partner, Financial Advisor

Cadence Financial Management

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	Presentation by the Adjunct Lecturer Industry Insights, Trends, and Improvements <i>Brent Sheppard – Cadence Financial Management</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Building Financial Futures <i>Mike Shamrell – Fidelity Investment</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brent Sheppard – Cadence Financial Management</i> <u>Panelists:</u> <i>Mark Hamilton – Transamerica</i> <i>Jared Hyman – The Standard</i> <i>Jeffrey Weaver – J.P. Morgan Asset Management</i> <i>MJ Zayac – AllianceBernstein</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>Will Blackall, C(k)P – MFS Investment Management</i> <i>Chris Brock – Ascensus, Brian Munn, C(k)P – American Century</i> <i>Lauren Top – Goldman Sachs, Don Worden – T. Rowe Price</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
<i>Agenda is Subject to Change</i>		