

**Wednesday, August 21<sup>st</sup>, 2024**

9:00 a.m. to 3:00 p.m.

Location:

**University of Southern California**

Ronald Tutor Campus Center

3607 Trousdale Parkway

**Los Angeles, CA 90007**

The Forum (RTCC 450)

Adjunct Lecturers Presenting:

**Samuel Martin, C(k)P®, AIF®, CRPS™ - Certy Partners**

<b>Agenda - The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:30 – 9:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:55 – 10:55	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>Fiduciary Governance and Best Practices</b> <i>Samuel Martin, C(k)P – Certy Partners</i>
10:55 – 11:05	<b>Break</b>	
11:05 – 11:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Misbehavin' in Retirement Plans – It's Time to Retire That Thinking</b> <i>Chris Anast – American Funds</i>
11:50 – 12:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Samuel Martin, C(k)P – Certy Partners</i> <u>Panelists:</u> <i>Amy Banker – Certy Partners</i> <i>Janna Hahn – American Funds</i> <i>Jennifer Love – Fidelity</i> <i>Art Villar – Blackrock</i>
12:35 – 12:50	<b>Break</b>	<b>Pick up your Lunch</b>
12:50 – 2:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is <i>Not</i> Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Staci Baker – J.P. Morgan</i> <i>Evan Gray – Ascensus</i> <i>Andrew Kremer – Fidelity</i> <i>Kamil Said – Certy Partners</i>
2:15 – 2:45	<b>Session 5</b>	<b>The Ideal Plan - <i>Interactive Discussion</i></b>
2:45 – 3:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		