

Tuesday, August 27, 2024

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

Location:

California State University San Marcos

McMahan House

Chancellor Ct

San Marcos, CA 92078

The Great Room

Adjunct Lecturers Presenting:

Ryan Stover

Client Executive – Retirement Services

Marsh McLennan

Agenda - The Plan Sponsor University

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

9:00 – 9:30	Breakfast / Registration	Registration & Sign-in
9:30 – 9:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:55 – 10:55	Session 1	Presentation by the Adjunct Lecturer Secure Act 2.0 <i>Ryan Stover – Marsh McLennan</i>
10:55 – 11:05	Break	
11:05 – 11:50	Session 2	Keynote Presentation Look Below the Surface <i>Tony Cannon – American Funds</i>
11:50 – 12:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Ryan Stover – Marsh McLennan</i> <u>Panelists:</u> <i>Patrick Bushlack – The Standard</i> <i>Orlando Cuevas – Empower</i> <i>Matt DeMarco – PIMCO</i> <i>Michele Giangrande – T. Rowe Price</i>
12:35 – 12:50	Break	Pick up your Lunch
12:50 – 2:15	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>Matt DeMarco & Tony Nikaj – PIMCO</i> <i>Christopher Donnager – MFS Investment Management</i> <i>John Lessley – Dimensional Fund Advisors</i> <i>Danielle McDonald – MassMutual Investment</i> <i>Taylor Pluss & Chris Jackson – Janus Henderson</i>
2:15 – 2:45	Session 5	The Ideal Plan - Interactive Discussion
2:45 – 3:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		