

**Wednesday, September 18, 2024**

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

Location:

**Fordham University School of Law**

150 W 62nd St

**New York City, NY 10023**

Bateman Room

Adjunct Lecturer Presenting:

**Burak Alpaslan, C(k)P®, CFP®, AIF®**

**Vital Planning Group**

**Agenda - The Plan Sponsor University**

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

9:00 – 9:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:30 – 9:50	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:50 – 10:50	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>A new benefit which is becoming a standard offering - Financial Wellness with special guest Allison Mislow</b> Everything you wanted to know about financial wellness, but you were too afraid to ask... <i>Burak N. Alpaslan C(k)P – Vital Planning Group</i>
10:50 – 11:05	<b>Break</b>	
11:05 – 11:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Is Your 401(k) in Sync with your Business Objectives?</b> <i>Alison Smith – Principal Financial</i>
11:50 – 12:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Burak N. Alpaslan C(k)P – Vital Planning Group</i> <u>Panelists:</u> <i>Jason Carlough – American Funds</i> <i>Monica Elvira – T.Rowe Price</i> <i>Allison Smith – Principal Financial</i>
12:35 – 12:50	<b>Break</b>	<b>Pick up your Lunch</b>
1:50 – 2:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Mark Cywin – Transamerica</i> <i>Roy Bentzen – Fisher Investments</i> <i>Cara Every – Fidelity Investments</i> <i>Jim Hakewill - MFS</i> <i>Justin Muni – J.P. Morgan</i>
2:15 – 2:50	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
2:50 – 3:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		