

**Tuesday, September 24<sup>th</sup>, 2024**

8:30 a.m. to 2:30 p.m.

Location:

**University of Chicago**  
**Gleacher Center – Room 404**  
450 North Cityfront Plaza  
**Chicago, IL 60611**

Adjunct Lecturer 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>		
8:30 – 9:00	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:00 – 9:25	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:25 – 10:25	<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>
10:25 – 10:35	<b>Break</b>	
10:35 – 11:10	<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 – 12:30	<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>Larry Boesch – Voya</i> <i>David Foley – The Standard</i> <i>Constantine Mulligan – Certy Partners</i> <i>Jason Weybrecht – American Funds</i>
12:30 – 12:40	<b>Break</b>	<b>Pick up your Lunch</b>
12:40 – 1:50	<b>Session 4 (Working Lunch)</b>	<b><i>What is Working in Today's 401(k) Plans?</i></b> <b><i>What is Not Working in Today's 401(k) Plan?</i></b> <u>Group Discussion Leaders:</u> <i>Larry Boesch – Voya</i> <i>Josh Gordon – American Funds</i> <i>David Foley – The Standard</i>
1:50 – 2:20	<b>Session 5</b>	<b><i>The Ideal Plan - Interactive Discussion</i></b>
2:20 – 2:30	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		