

Thursday, October 17, 2024
8:00 a.m. - 2:00 p.m

Location:
Wylie Center & Tupper Manor
Endicott College
295 Hale Street
Beverly, MA 01915
Newburyport

Adjunct Lecturers Presenting:
Michaela Scott, C(k)P®
The Strategic Retirement Benefits Group

The Plan Sponsor University – Agenda <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
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 Lecturers Producing Outcomes and Staying Compliant <i>Michaela Scott, C(k)P – The Strategic Retirement Benefits Group</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation <i>Fiduciary Fundamentals – Demystifying Your Obligation to Retirement Plan Participants</i> <i>Sue Walton – Capital Group / American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Michaela Scott, C(k)P – The Strategic Retirement Benefits Group</i> <u>Panelists:</u> <i>Allen Ehling – Fidelity Investments</i> <i>Ryan Fay – John Hancock</i> <i>Todd Mann – Alliance Bernstein</i> <i>Alan Valença – T. Rowe Price</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>Jeff Beauregard, C(k)P – Transamerica</i> <i>Seth Masters – The Standard</i> <i>Michael Pisano – Fidelity Investments</i> <i>Dan Zibaitis – John Hancock</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>		