

Wednesday, October 16, 2024

Location:

Arizona State University
Memorial Union, Union Stage #085
301 E Orange St
Tempe, AZ 85281

Adjunct Lecturer Presenting:
Shawn West C(k)P®
Founder, ERISA Director
CuraFin Advisors

Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 9:00	Breakfast / Registration	Registration & Sign-in
9:00 – 9:25	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:25 – 10:25	Session 1	Presentation by the Adjunct Lecturer The Role of the Advisor <i>Shawn West, C(k)P® – CuraFin Advisors</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation SECURE 2.0 Plan Considerations – What You Need to Know (and Do) Now <i>Annie Messer – Pension Resource Institute</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Shawn West, C(k)P® – CuraFin Advisors</i> <u>Panelists:</u> <i>Matthew DeMarco – PIMCO</i> <i>Brian Nocera – Voya Financial</i> <i>Tina White, C(k)P – Franklin Templeton</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	Session 4 (Working Lunch)	What is Working in Today's 401(k) Plans? What is <i>Not</i> Working in Today's 401(k) Plan? <u>Group Discussion Leaders:</u> <i>Kate Aragon – CuraFin Advisors</i> <i>Tania Barrera – CuraFin Advisors</i> <i>Ty Wheeler – CuraFin Advisors</i>
1:45 – 2:15	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		