

Tuesday, October 29th, 2024

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

Location:

**University of Maryland
Samuel Riggs IV Alumni Center**

Crist Executive Board Room

College Park, MD 20742

Adjunct Lecturers Presenting:

Kim Cochrane & Eduardo Gimenez

HUB International

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 – The Plan Sponsor University</i>
9:25 – 10:25	Session 1	Presentation by the Adjunct Lecturer Balancing Fiduciary Duties and Financial Wellness: The Pillars of the Perfect Retirement Plan <i>Kim Cochrane – HUB International</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation Stop Playing Mind Games – Help Improve Participant Outcomes with Behavioral Insights <i>Jennifer Miller – American Funds</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Ed Gimenez – HUB International</i> <u>Panelists:</u> <i>David Frost – OneAmerica</i> <i>Jennifer Miller – American Funds</i> <i>David Sargent – BlackRock</i> <i>Sarah Zaikowski – Vanguard</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:30	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>Shaun Bromley – JP Morgan, Matthew Buccigrosso – Guggenheim Investments, Stephen Carrera – Ascensus, Rick Cortellessa – Goldman Sachs, Daniel Kretz – The Standard, James Polito, C(k)P – Nuveen, Martin Smith – Empower, Chad Stewart – John Hancock, John Uricchio – Victory Capital Management, Matt Vanaman – PIMCO</i>
1:30 – 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>		