



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

Standard, James Polito, C(k)P – Nuveen, Martin Smith – Empower, Chad Stewart John Hancock, John Uricchio – Victory Capital Management, Matt Vanaman – Political Plan - Interactive Discussion	HUB International		
Session 2 Session 3 Session 3 Session 4 Panelists: Jennifer Miller – American Funds David Sargent – BlackRock Sarah Zaikowski – Vanguard David Sargent – BlackRock Sarah Zaikowski – Vanguard David Sargent – Break Pick up your Lunch			Agenda
Breakfast / Registration Registration Registration Registration Sign-in			The Plan Sponsor University
Registration Registration Registration Registration & Sign-in		The C	(k)PF / The Certified 401(k) Plan Fiduciary Designation
9:25 – 10:25 Session 1 Presentation by the Adjunct Lecturer Balancing Fiduciary Duties and Financial Wellness: The Pillars of the Perfect Retirement Plan Kim Cochrane – HUB International 10:25 – 10:35 Break Keynote Presentation Stop Playing Mind Games – Help Improve Participant Outcomes with Behavioral Insights Jennifer Miller – American Funds Panel Discussion with Industry Professionals Moderator: Ed Gimenez – HUB International 11:20 – 12:05 Session 3 Panelists: Jennifer Miller – American Funds David Sargent – BlackRock Sarah Zaikowski – Vanguard 12:05 – 12:20 Break Pick up your Lunch What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plan? Group Discussion Leaders: 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 – P. 1:30 – 2:15 Session 5 The Ideal Plan - Interactive Discussion	8:30 – 9:00	•	
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Session 2 Session 2 Session 2 Session 2 Session 3 Session 3 Panel Discussion with Industry Professionals Moderator: Ed Gimenez – HUB International Panelists: Jennifer Miller – American Funds Jennifer Miller – American Funds Panelists: Jennifer Miller – American Funds David Sargent – BlackRock Sarah Zaikowski – Vanguard 12:05 – 12:20 Break Pick up your Lunch What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plans? Session 4 (Working Lunch) Stephen Carrera – Ascensus, Rick Cortellessa – Goldman Sachs, Daniel Kretz – The Standard, James Polito, C(k)P – Nuveen, Martin Smith – Empower, Chad Steward John Hancock, John Uricchio – Victory Capital Management, Matt Vanaman – Panelists: Session 5 The Ideal Plan - Interactive Discussion Panelists: Jennifer Miller – American Funds Moderator: Ed Gimenez – HUB International Panelists: Jennifer Miller – American Funds Jen	9:25 – 10:25	Session 1	Balancing Fiduciary Duties and Financial Wellness: The Pillars of the Perfect Retirement Plan
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Agenda is Subject to Change	2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements