

Thursday, October 3, 2024

8:00 a.m. to 2:00 p.m.

Location:

Drake University
Olmsted Center
2875 University Ave
Des Moines, IA 50311
Parents Hall South

Adjunct Lecturer Presenting:

Brian Thompson C(k)P®

Founder & President

RockWay Wealth Partners

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 Adjunct Lecturer Secure 2.0 The Role of the Retirement Plan Advisor <i>Brian Thompson, C(k)P – RockWay Wealth Partners</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation ERISA Cybersecurity: Safeguarding Retirement Plans <i>Caleb Brus – BrownWinick</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brian Thompson, C(k)P – RockWay Wealth Partners</i> <u>Panelists:</u> <i>Joe Fazio – American Funds</i> <i>Ned McNally – State Street Global Advisors</i> <i>Dave Paulsen – ARS</i> <i>Heather Townsend-Macan – Forvis Mazars</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>Susan Hagerman – RockWay Wealth Partners</i> <i>Ned McNally – State Street Global Advisors</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		