

Wednesday, October 30, 2024

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

Location:

Fairfield University

Charles F. Dolan School of Business

Event Hall

1073 N Benson Rd

Fairfield, CT 06824

Adjunct Lecturer Presenting:

Michael Del Re III, ChFC®, REBC®, AIF®

Northeast Managing Partner

Prime Capital Investment Advisors

The Plan Sponsor University – Agenda

The C(k)PF / The Certified 401(k) Plan Fiduciary Designation

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	Adjunct Lecturer Presenting Retirement Readiness, Participant Outcomes <i>Michael Del Re III – Prime Capital Investment Advisors</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation <i>Sue Walton – American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Michael Del Re III – Prime Capital Investment Advisors</i> <u>Panelists:</u> <i>Paul Giovanniello – Calamos Funds</i> <i>Bob Hunt – Fidelity Investments</i> <i>Todd Mann – AllianceBernstein</i> <i>Michael Smoots – Prime Capital Investment Advisors</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 <i>Not</i> Working in Today's 401(k) Plan?
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>		