

**Tuesday, October 22nd, 2024
8:00 AM – 2:00 PM**

**Location:
Butler University
Atherton Union, Conference Room 326
704 W Hampton Dr.
Indianapolis, IN 46208**

Adjunct Lecturer Presenting:
Zachary Chavira, C(k)P®
Retirement Plan Services Team Lead & Lead Investment Advisor
Donaldson Capital Management

Agenda - The Plan Sponsor University <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>Jenny Jenkins – The Plan Sponsor University</i>
8:55 – 9:55	Session 1	Presentation by the Adjunct Lecturer The Role of the Retirement Plan Advisor <i>Zachary Chavira C(k)P – Donaldson Capital Management</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation The Latest Generation of Fiduciary Failures Why Plan Sponsors Continue To Be Sued And The Importance Of Process <i>Jay Kilgore – Ameritas</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Zachary Chavira C(k)P – Donaldson Capital Management</i> <u>Panelists:</u> <i>Jeff Allen – Broadridge Financial Solutions</i> <i>Leeanne Lollar – Donaldson Capital Management</i> <i>Andrew Payne – Janus Henderson</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?
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>		