

Wednesday, November 13, 2024
8:30 a.m. to 2:30 p.m.

Location:

Smith and Howard Advisory, LLC.
271 17th Street NW
Fifth Floor
Atlanta, GA 30363
Conference Room

Adjunct Lecturer Presenting:

Shelly Horwitz

Managing Director

World Investment Advisors, LLC.

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, C(k)P – The Plan Sponsor University</i>
9:25 – 10:15	Session 1	The Convergence of Healthcare & Retirement <i>Shelly Horwitz – World Investment Advisors, LLC.</i>
10:15 – 10:35	Session 2	Benefits Beyond Compliance, Maximizing Your Partnership <i>Russ Kanner and Jill Pitcher – Smith & Howard</i>
10:35 – 10:45	Break	
10:45 – 11:25	Session 3a	Panel Discussion with Clients <u>Moderator:</u> <i>Rob Appleman – World Investment Advisors, LLC.</i> <u>Panelists:</u> <i>Vanessa Rahm – Click Therapeutics</i> <i>Jasmine Presley – IMI Agency</i> <i>Sara Ozment – Fortune Johnson</i> <i>Lavina Moss – Miller Zell</i>
11:25 – 12:05	Session 3b	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>James Vanke – World Investment Advisors, LLC.</i> <u>Panelists:</u> <i>Kevin Keogh – MFS</i> <i>Dale Korman – Harbor Capital</i> <i>Lauren Top – State Street Global Advisors</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	Session 4 (Working Lunch)	What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plan? <u>Facilitators:</u> <i>Joshua Binford – Invesco and Scott Calloway – JP Morgan</i> <i>Ryan Moore – Newport Group and Hannah Rouse – T. Rowe Price</i>
1:45 – 2:15	Session 5	The Ideal Plan - Interactive Discussion
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements

Agenda is Subject to Change