

Wednesday, November 20th, 2024
8:00 a.m. to 2:00 p.m.

Location:
Harper Alumni Center
6000 J Street
Sacramento, CA 95819
Capital Room

Adjunct Lecturer Presenting:
Sheldon Nix, C(k)P®
Exceed Wealth & Retirement Group, Inc.

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 Proven Methods to Help your Employees Visualize, Plan, and Reach Retirement Successfully <i>Sheldon Nix, C(k)P – Exceed Wealth & Retirement Group, Inc.</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Retirement Plan Design & Regulatory Update – A Deep Dive into Secure 2.0 <i>Ken Roberts – Nicholas Pension Consultants</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Sheldon Nix, C(k)P – Exceed Wealth & Retirement Group, Inc.</i> <u>Panelists:</u> <i>Lisa Archuleta – ADP</i> <i>Murray Cleaner – Morningstar Investment Management</i> <i>Richard Merson – PIMCO</i> <i>Maria Rayas McPhee – Empower</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>Blake Bandani – Voya Financial</i> <i>Zach Carstensen – John Hancock</i> <i>Chris Dunham & Chad Mihm – Mutual of Omaha</i> <i>Matt Fraisse – Principal Financial Group</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		