

**Tuesday, November 19, 2024**

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

Location:

**DeSales University**

DeSales University Center

2755 Station Avenue

**Center Valley, PA 18034**

Commonwealth Room

Adjunct Lecturers Presenting:

**Brendan Speers, C(k)P®**

*Partner | Director of Retirement Plan Services*

**Legacy Planning**

<b>The Plan Sponsor University – Agenda</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:55 – 9:55	<b>Session 1</b>	<b>The Role of the Retirement Plan Advisor</b> <i>Brendan Speers, C(k)P – Legacy Planning</i>
9:55 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Fiduciary Fundamentals – Demystifying Your Obligations to Retirement Plan Participants</b> <i>John Doyle – Capital Group / American Funds</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Brendan Speers, C(k)P – Legacy Planning</i> <u>Panelists:</u> <i>Conni King – Legacy Planning</i> <i>Jim Hackewill – MFS Investment Management</i> <i>Matt Leeper – Capital Group / American funds</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch</b>
11:50 – 1:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is <i>Not</i> Working in Today's 401(k) Plan?</b>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - <i>Interactive Discussion</i></b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		