

Tuesday, December 3, 2024
8:00 a.m. to 2:00 p.m.

Location:
Rollins College
Faculty Club
1000 Holt Ave
Winter Park, FL 32789
Faculty Club Room

Adjunct Lecturer Presenting:
Sue Perez, C(k)P®
First Vice President
Wells Fargo Advisors

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 – 8:50	Introduction	Introduction to The Plan Sponsor University <i>Jenny Jenkins – The Plan Sponsor University</i>
8:50 – 9:50	Session 1	Presentation by the Adjunct Lecturer The Role of the Advisor <i>Sue Perez, C(k)P – Wells Fargo Advisors</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation The Building Blocks for a Successful Retirement Plan <i>Dan Graham & Carlos Lopez – Principal Financial Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Sue Perez, C(k)P – Wells Fargo Advisors</i> <u>Panelists:</u> <i>Niel Cabrera – Fisher Investments</i> <i>Bruce Cobey – John Hancock</i> <i>Lauren Top – State Street Global Advisors</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>James Gilligan & Michael Shamon – The Standard</i> <i>Raul Vargas – Nationwide Financial</i> <i>Lindsey Zimmerman – 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>		