

Thursday, January 30, 2025

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

Location:

University of New Mexico

Student Union Building

87106 Albuquerque, NM 87131

SUB Ballroom C

Adjunct Lecturer Presenting:

Evan Cole, C(k)P®

HOPE Financial

The Plan Sponsor University – Agenda <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	Adjunct Lecturer Presenting The Role of the Retirement Plan Advisor <i>Evan Cole, C(k)P® – HOPE Financial</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Secure 2.0 <i>Michael Marsh - Super Chief Pension Services</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Evan Cole, C(k)P® – HOPE Financial</i> <u>Panelists:</u> <i>Michael Marsh - Super Chief Pension Services</i> <i>Josh Gordon– Capital Group / American Funds</i> <i>Mary Kate Radloff – Capital Group / American Funds</i>
11:35 – 11:50	Break	Pick up your Lunch Sponsored by The Standard
11:50 – 1:15	Session 4 (Working Lunch)	What is Working in Today's 401(k) Plans? What is <i>Not</i> Working in Today's 401(k) Plan? <u>Group Discussion Leaders:</u> <i>Josh Gordon – Capital Group / American Funds</i> <i>Michael Marsh - Super Chief Pension Services</i> <i>Joseph Mulcahy – Capital Group / American Funds</i> <i>Mary Kate Radloff – Capital Group / American Funds</i>
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>		