

Wednesday, January 29, 2025

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

Location:

Randolph Macon College

Brock Commons

304 Henry St.

Ashland, VA 23005

Dollar Tree Room

Adjunct Lecturer Presenting:

J. Cory Hoffer, C(k)P®, Hermitage Wealth Management, 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>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:55 – 9:55	Session 1	Presentation by Adjunct Lecturer Attributes of a Retirement Plan Advisor <i>J. Cory Hoffer, C(k)P – Hermitage Wealth Management, Inc</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation What Are The Latest Trends In DC Plans? <i>Sue Walton – Capital Group / American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> J. Cory Hoffer, C(k)P – Hermitage Wealth Management, Inc. <u>Panelists:</u> <i>David Cox – benefitRFP</i> <i>Ted Cox – City National Rochdale</i> <i>Lisa Germano – Actuarial Benefits & Design Company</i> <i>Joseph Smith – John Hancock</i>
11:35 – 11:50	Pick your Lunch	
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>Will Davis – AllianceBernstein</i> <i>Shaun Bromley – JP Morgan</i> <i>Stephen Long – Fidelity Investments</i> <i>Jay Kirland – Nationwide</i> <i>Steven Caruso – Voya</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>		