

## Virtual TPSU Program

**Tuesday, January 28, 2025**

**8:30 a.m. - 12:00 p.m. Central Time**

Adjunct Lecturer Presenting:

**Brian Thompson, C(k)P®**

**Rock Way Wealth Partners**

<b>Agenda</b> <b>The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Jenny Jenkins – The Plan Sponsor University</i>
8:55 – 9:35	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>A SECURE Act 2.0 Update and Beyond Retirement – Convergence of Personalized Financial Advice, Benefits, and Employee Wellness at the Workplace</b> <i>Brian Thompson, C(k)P® – Rock Way Wealth Partners</i>
9:35 – 9:45	<b>Break</b>	
9:45 – 10:30	<b>Session 2</b>	<b>Keynote Presentation</b> <b><i>Retiring “On Time” Is Important for The Employee AND the Employer</i></b> <i>Dave Paulsen, CEO – Advantage Retirement Solutions</i>
10:30 – 11:15	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Brian Thompson, C(k)P® – Rock Way Wealth Partners</i> <u>Panelists:</u> <i>Caleb Brus– Brown Winick</i> <i>Kelsey Parker– Forvis Mazars</i> <i>Kyle Peterson– Independent TPA Contractor</i>
11:15 – 11:25	<b>Break</b>	
11:25 – 11:50	<b>Session 4</b>	<b>The Ideal Plan – <i>Interactive Discussion</i></b>
11:50 – 12:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		