

**Thursday, March 13<sup>th</sup>, 2025**

9:00 a.m. to 3:00 p.m.

Location:

**Invesco Ltd. Corporate Headquarters**

**Midtown Union**

1331 Spring Street NW, 26<sup>th</sup> Floor

**Atlanta, GA 30309**

The Flanagan Room

Adjunct Lecturer Presenting:

**Shelly Horwitz**

*Managing Director*

**World Investment Advisors, LLC.**

<b>Agenda - The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:30 – 9:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Miguel Dorsan – The Plan Sponsor University</i>
9:55 – 10:40	<b>Session 1</b>	<b>The Role of The Advisor</b> <i>Shelly Horwitz – World Investment Advisors, LLC.</i>
10:40 – 11:00	<b>Session 2</b>	<b>Retirement and Healthcare Litigation Update</b> <i>Jodi Green – Tatum, Hillman &amp; Powell</i>
11:00 – 11:15	<b>Break</b>	
11:15 – 11:55	<b>Session 3a</b>	<b>Elevate Your Financial Wellness Game</b> <i>Cindy Ventura – Fidelity Investments</i>
11:55 – 12:35	<b>Session 3b</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>James Vanke – World Investment Advisors, LLC.</i> <u>Panelists:</u> <i>Dale Korman – Harbor Capital</i> <i>Sara Lowery – Nuveen</i> <i>Brian Munn – American Century</i> <i>Doug Shannon – T. Rowe Price</i> <i>Lauren Top – State Street</i>
12:35 – 12:50	<b>Break</b>	<b>Pick up your Lunch</b>
12:50 – 2:20	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Mark Conroy – Franklin Templeton; Chris Minton – Federated Hermes; Tim Rueling – Allspring; Amy Thomas – Vanguard</i>
2:20 – 2:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
2:45 – 3:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		