

Thursday, April 10th, 2025
8:30 a.m. – 2:30 p.m.

Location:
Arizona State University
Memorial Union, La Paz
301 E Orange St
Tempe, AZ 85281

Adjunct Lecturer Presenting:
Shawn West C(k)P®
Founder, ERISA Director
CuraFin Advisors

| Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> | | |
|--|--------------------------------------|--|
| 8:30 – 9:00 | Breakfast / Registration | Registration & Sign-in |
| 9:00 – 9:25 | Introduction | Introduction to The Plan Sponsor University <i>Jenny Jenkins – The Plan Sponsor University</i> |
| 9:25 – 10:25 | Session 1 | Presentation by the Adjunct Lecturer Retirement Readiness, Participant Outcomes <i>Shawn West, C(k)P® – CuraFin Advisors</i> |
| 10:25 – 10:35 | Break | |
| 10:35 – 11:35 | Session 2 | Keynote Presentation SECURE 2.0 Plan Considerations – What You Need to Know (and Do) Now <i>Annie Messer – Pension Resource Institute</i> |
| 11:35 – 12:20 | Session 3 | Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Shawn West, C(k)P® – CuraFin Advisors</i> <u>Panelists:</u> <i>Travis Jack – Metz CPA</i> <i>Shawn Parker – Matthews Gold Kennedy & Snow</i> <i>Stargret Thompson – Matthews Gold Kennedy & Snow</i> |
| 12:20 – 12:35 | Break | Pick up your Lunch |
| 12:35 – 1:45 | 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>Rory Camardello – Harbor Capital Advisors, Inc.</i> <i>Matthew DeMarco – PIMCO</i> <i>Brian Nocera – Voya Financial</i> |
| 1:45 – 2:15 | Session 5 | The Ideal Plan - Interactive Discussion |
| 2:15 – 2:30 | Closing | The C(k)PF Designation and Closing Statements |
| <i>Agenda is Subject to Change</i> | | |