

Wednesday, May 21st, 2025

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

Location:

California State University

Harper Alumni Center

6000 J St.

Sacramento, CA 95819

Capital Room

Adjunct Lecturer Presenting:

Sheldon Nix, C(k)P®

Co-Founder | CEO

Exceed Wealth & Retirement Group, 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>Jenny Jenkins – The Plan Sponsor University</i>
8:55 – 9:50	Session 1	Adjunct Lecturer Presenting Optimizing Oversight: The Advisor’s Role in Effective Retirement Plan Management <i>Sheldon Nix, C(k)P® & Chris Bozzuto– Exceed Wealth & Retirement Group, Inc.</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Secure 2.0 <i>Sheldon Nix, C(k)P® & Chris Bozzuto – Exceed Wealth & Retirement Group, Inc.</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Sheldon Nix, C(k)P® – Exceed Wealth & Retirement Group, Inc.</i> <u>Panelists:</u> <i>Chris Bozzuto – Exceed Wealth & Retirement Group, Inc.</i> <i>Zach Carstensen – John Hancock</i> <i>Matt Fraise – Voya</i> <i>Maria Rayas McPhee – Empower</i> <i>Mick Trainor – Benetech</i>
11:35 – 11:50	Break	Pick up your lunch
11:50 – 1:15	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>Chris Bozzuto – Exceed Wealth & Retirement Group, Inc.; Zach Carstensen – John Hancock; J Paul Hurt & Chad Mihm – Mutual of Omaha</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>		