

Tuesday, June 3rd, 2025
8:00 a.m. to 2.00 p.m

Location:
Rollins College
Faculty Club
1000 Holt Ave
Winter Park, FL 32789
Faculty Club Room

Adjunct Lecturer Presenting:
Sue Perez, C(k)P®
First Vice President
Wells Fargo Advisors

| 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 Managing Your Retirement Plan – A Fiduciary Foundation <i>Sue Perez, C(k)P® – Wells Fargo Advisors</i> |
| 9:50 – 10:05 | Break | |
| 10:05 – 10:50 | Session 2 | Keynote Presentation Building Blocks for a Successful Retirement Plan! <i>Dan Graham – Principal Financial Group</i> |
| 10:50 – 11:35 | Session 3 | Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Sue Perez, C(k)P® – Wells Fargo Advisors</i> <u>Panelists:</u> <i>Jim Gilligan – The Standard</i> <i>Perry Lazarus – Transamerica</i> <i>Scott Sheehan – Jackson National</i> <i>Raul Vargas – Nationwide Financial</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>Jim Gilligan – The Standard</i> <i>Perry Lazarus – Transamerica</i> <i>Scott Sheehan – Jackson National</i> <i>Raul Vargas – Nationwide Financial</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> | | |