

Thursday
January 27, 2021
11 am - 2:00 pm EST
Day 1 Agenda



- 11:00 am Opening Remarks by Ary Rosenbaum
- 11:05 am “W”e’re Live Pal”, **The Rosenbaum Law Firm P.C.**
- 11:30 am “PEPs, are they worth it?”, **Granite Group**
- 12:00 pm “Talk, Plan, Act: Education for Plan Participants” **Invesco**
- 12:30 pm “The Cost of Complacency”, **IPX Retirement**
- 1:00 pm “401(k) Issues and Corrections” **Sunwest Pensions**



Friday
January 28, 2021
11:00 - 2:30 pm EST
Agenda
Day 2

- 11:00 am “Pension Services”, **Pension Services**
- 11:30 am “The ABCs of 401k Sales Always Be!!!g,” **Millennium Retirement**
- 12:00 pm “New Auditing Standards 134-140 & Related Impact on Plan Sponsors” -**JMM, CPA**
- 12:30 pm ““Don’t leave money on the table” **Retire Ready Solutions**
- 1:00 pm “PCS”, **PCS**
- 1:30 pm “Confession and Transformation of a Pension Geek!” **CBC Retirement Partners**
- 2:00 pm “NS Capital” **NS Capital**