



Tuesday
March 10, 2020
9 am - 5 pm
Day 1 Agenda
Room Osprey 1

- 9:00 am Opening Remarks, Ary Rosenbaum
- 9:15 am “2020 Election Update” **Ron Nehring, MSNBC Contributor, National Spokesman, Ted Cruz for President 2016**
- 9:45 am “MEP/PEPS — Better Than Ever”, **Granite Group**
- 10:15 am “Cash Balance Plans: America’s Greatest Tax Strategy Gets Even Better!”, **Kravitz**
- 11:00 am Break
- 11:15 am “Aligning Our Partners – Risks & Rewards”, Mark Koeppen and Jeff Linkowski, **FPS Trust**
- 12:00 pm Lunch
- 12:30 pm **Retireholi(k)s** Recording of episode with JD and the gang and special guest Ary Rosenbaum,
- 1:30 pm Meet and Greet with **Rangers Legend Ron Duguay**
- 2:00 pm “Growing AUM with 401(k) Participant Engagement” Ed Dressel, **Retire Ready Solutions**
- 2:30 pm “Simplify and Clarify Your Story. Your Marketing in 2020 Depends on It!” Alan Gross, **GSM Marketing**
- 3:15 pm “HSAs The Genesis: From Spending, to Saving, to Investing”, Roger B. Jorgensen, **Alerus**
- 3:45 pm “Common Audit Findings – Understand the Risks and Implement Mitigating Controls” **Pension Assurance**
- 4:30 pm “ERISA is a Team Sport” James Holland **Millenium Investment & Retirement Advisors**
- 5:00 pm Day One Concludes



Wednesday
March 11, 2020
9 am - 5 pm
Agenda
Day 2
Room Osprey 1

8:00 am	Breakfast
9:00 am	“The SECURE Act, Yadda, Yadda, Yadda” Ary Rosenbaum, The Rosenbaum Law Firm P.C.
9:30 am	“Trailblazers in Benefits: Crush Student Loan Debt & Win the Talent Acquisition Race”, Thrive
10:00 am	“Our EPCOT- A look into the Future of our business, Bright Worxx
11:00 am	Meet and Greet with Baseball Hall of Fame Pitcher and Intimidating Closer, Goose Gossage
Noon	Event Conclusion