

**Thursday
January 21, 2021
11 am - 5:30 pm EST
Day 1 Agenda**



- 11:00 am Opening Remarks by Ary Rosenbaum and Introduction of Bronze Sponsors
- 11:15 am 2021 Political Update, **Ron Nehring**
- 12:00 pm **Virtual Meet and Greet with Walt Clyde Frazier**
- 12:30 pm “PEPs, are they worth it?”, **Granite Group**
- 1:00 pm “Taming the Plan Audit”, **Pension Assurance**
- 1:30 pm “Think you know fees? The fee considerations that shape the cost of the plan,” **PCS Retirement**
- 2:00 pm “What Lies Behind and Beyond Fiduciary Laws and Regulations?” **f360/Matrix**
- 3:00 pm “Panel Discussion: Relationship Building: 2021 Style ,” **Females and Finance Forum**
- 3:30 pm “Rethinking Your Plan Profitability,” **CUNA Mutual**
- 4:00 pm “Introduction to the Certified Plan Sponsor Professional (CPSP)TMCredential,”
Nationwide/Nuveen
- 4:30 pm “Consulting is the Key to Client Acquisition, “ **Creative Plan Design**
- 5:00pm “All You Wanted To Know About the Retirement Plan Business, “, **MilleniuM Retirement**
- 5:30 pm Day One Concludes

Friday
January 22, 2021
11 am - 5:00 pm EST
Agenda
Day 2



- 11:00 am Drop the Jargon, **Empower**
- 11:30 am “Personalized Retirement Accounts/Managed Accounts; The Next Evolution in QDIA Investing,” **Russell Investments**
- 12:00 pm Virtual Meet and Greet with Doc Gooden
- 12:30 pm “Next Steps: Owning the Virtual Experience,” **Sheri Fitts**
- 1:00 pm “The Retireholi(k)s Live”, **The Retireholi(k)s**
- 2:00 pm “Inspiring > Convincing” **401(k) Jake**
- 2:30 pm TBA, **WealthPrime**
- 3:00 pm “This is This: 2021 in The Retirement Plan Business,” **The Rosenbaum Law Firm P.C.**
- 3:30 pm “401(k) Market: A whole new world!,” **Value Point Associates**
- 4:00 pm “Help Plan Sponsors Manage Their Fiduciary and Audit Risk of Missing Participants,” **FPS Trust**
- 4:30 pm “3(16) Services,” **401(k) Reboot**
- 5:00 pm Event Conclusion