

AGENDA

- 8:00am-8:30am** **REGISTRATION & SPONSOR BREAKFAST**
LOCATION: Overland Park Convention Center Ballroom Pre-Function
- 8:30am-8:40am** **WELCOME COMMENTS**
Scott Colangelo, AIF®
CHAIRMAN; Qualified Plan Advisors
- 8:40am-8:45am** **INTRODUCTIONS & SUMMIT KICK OFF**
Matthew Wolniewicz, AIFA®
PRESIDENT; F1360
- 8:45am-9:35am** **PENSION CRISIS OR SAVINGS OPPORTUNITY?**
Sarah Simoneaux, CPC
PRESIDENT, Simoneaux Consulting Services
- How technology can integrate paycheck & savings choices - including emergency savings, loan repayments, HSA & 401(k)
 - Decoding jargon to help employees understand how all the pieces can work together
 - Why expert face-to-face communication (still) outweighs even the best technology
- 9:35am-10:25am** **ERISA ATTORNEY PERSPECTIVE: LEGAL & PRACTICAL UPDATE**
Fred Reish, Esq.
PARTNER; Drinker, Biddle & Reath LLP
- What Is Troubling Our Clients
 - How We're Advising Our Clients
 - Risk & Opportunity on the Horizon
- 10:25am-10:40am** **BREAK**
- 10:40am-11:30am** **BREAKOUT SESSIONS:**
FIDUCIARY WELLNESS FOCUS
MODERATOR: Matthew Eickman, J.D., AIF®
DIRECTOR; ERISA SERVICES; Qualified Plan Advisors
- PARTICIPANT WELLNESS FOCUS**
MODERATOR: Glenn Spencer
CHIEF EXECUTIVE OFFICER; Qualified Plan Advisors
- 11:30am-12:20pm** **FINANCIAL WELLNESS: WHY IT MATTERS TO YOUR COMPANY & EMPLOYEES**
Robert Cruz, CIMA®, C(k)P®, CRPS®, AIFA®
EXECUTIVE VICE PRESIDENT & MANAGING DIRECTOR; Financial Fitness for Life
- Christian Mango, AIFA®
EXECUTIVE VICE PRESIDENT; Financial Fitness for Life
- Recognizing Financial Stress
 - Delivery of Services to Foster Wellness
 - Measuring the Value of Financial Wellness
- 12:20pm-1:05pm** **LUNCH**
LOCATION: Ballroom B
Department of Labor & Legislative Update
John True
SUPERVISORY INVESTIGATOR; U.S. Department of Labor-Employee Benefits Security Administration
MODERATOR: Matthew Wolniewicz, AIFA®
PRESIDENT; F1360
- 1:05pm-1:55pm** **LIFETIME INCOME: DIFFERENT PERSPECTIVES ON THE PROBLEMS & SOLUTIONS**
Scott Colangelo, AIF®
CHAIRMAN; Qualified Plan Advisors
- Ralph Ferraro
SENIOR VICE PRESIDENT, HEAD OF PRODUCT, RETIREMENT, PLAN SERVICES; Lincoln Financial Group
- Richard T. Luchinsky
SENIOR VICE PRESIDENT, Head of Financial Institutions & Retirement; American Century Investments
- Vidya Rajappa, CFA
VICE PRESIDENT; Portfolio Manager; American Century Investments
- MODERATOR: Scott Liggett, J.D.
DIRECTOR; ERISA Oversight; Qualified Plan Advisors
- 1:55pm-2:45pm** **AN EVOLUTION IN FIDUCIARIES & EMPLOYEES' WELLNESS**
Matthew Eickman, J.D., AIF®
DIRECTOR; ERISA Services; Qualified Plan Advisors
- Shifting Fiduciary Focus
 - Implementing Best Practices
 - Implementing Outcomes-Driven Solutions
- 3:00pm-3:15pm** **CLOSING COMMENTS**
Glenn Spencer
CHIEF EXECUTIVE OFFICER; Qualified Plan Advisors
Matthew Wolniewicz, AIFA®
PRESIDENT; F1360