

2022 QUALIFIED PLAN FIDUCIARY SUMMIT NEW FIDUCIARY PERSPECTIVES

TUESDAY, APRIL 19, 2022 | OVERLAND PARK, KS

PRESENTED BY  **QUALIFIED
PLAN ADVISORS**

AGENDA:

- 8:00-8:30 am** REGISTRATION & SPONSOR BREAKFAST
- 8:30-8:40 am** WELCOME COMMENTS
SCOTT COLANGELO, AIF®, CHAIRMAN, QPA
- 8:40-8:45 am** INTRODUCTIONS & SUMMIT KICK OFF
BONNIE TREICHEL, CHIEF SOLUTIONS OFFICER, ENDEAVOR RETIREMENT
- 8:45-9:35 am** DIFFERENT COMMUNICATIONS WITH DIFFERENT EMPLOYEE GENERATIONS
SARAH SIMONEAUX, CPC, PRESIDENT, SIMONEAUX CONSULTING SERVICES
- 9:35-10:25 am** INNOVATION IN PARTICIPANT SOLUTIONS: FINANCIAL WELLNESS, IN-PLAN INCOME, HSAs, AND ADVISOR MANAGED ACCOUNT SERVICES
MODERATOR: BONNIE TREICHEL, CHIEF SOLUTIONS OFFICER, ENDEAVOR RETIREMENT
SEAN KLOCK, CFP®, CIMA®, AIF®, SVP OF INSTITUTIONAL BUSINESS DEVELOPMENT, MORNINGSTAR
CHRISTIAN MANGO, AIFA®, PRESIDENT, FINANCIAL FITNESS FOR LIFE
ROBERT MASSA, CHFC®, CEBS®, CPFA®, AIF®, CHSA®, CBC, MANAGING DIRECTOR, HOUSTON MARKET, QPA
KEVIN TOLEDANO, DIRECTOR OF MANAGED ACCOUNT SERVICES, QPA
MATT WOLNIEWICZ, AIFA®, PRESIDENT, INCOME AMERICA
- 10:25-10:35 am** BREAK
- 10:35-11:25 am** RECORDKEEPER INNOVATION & DATA SECURITY
PRESENTERS TO BE DETERMINED
- 11:25 am-12:15 pm** BREAKOUT SESSIONS:
FIDUCIARY WELLNESS FOCUS
MODERATOR: SCOTT LIGGETT, J.D., AIF, DIRECTOR OF ERISA OVERSIGHT, QPA
PARTICIPANT WELLNESS FOCUS
MODERATOR: TERRI LEWIS, CLU®, CHFC®, PARTNER, QPA
- 12:15-1:00 pm** LUNCH
* *PLAN SPONSOR AWARDS*
* *PLAN ADVISOR/CONSULTANT AWARDS*
- 1:00-1:50 pm** PERSPECTIVES FROM INDUSTRY MEDIA LEADERS
MODERATOR: TERRA MCBRIDE, MBA, AIF®, CHIEF MARKETING OFFICER, PRIME CAPITAL INVESTMENT ADVISORS / QPA
FRED BARSTEIN, JD, C(K)P, FOUNDER & CEO TRAU, TPSU, & 401KTV
JAMES DORNBROOK, STAFF WRITER, KANSAS CITY BUSINESS JOURNAL
BRIAN ANDERSON, MANAGING EDITOR, 401 (K) SPECIALIST
- 1:50-2:40 pm** KEYNOTE: FIDUCIARY PERSPECTIVES
FRED REISH, ESQ. PARTNER, FAEGRE DRINKER BIDDLE & REATH LLP
- 2:40-3:05 pm** THINKING LIKE A MODERN DAY FIDUCIARY
MATTHEW EICKMAN, J.D., AIF®, NATIONAL RETIREMENT PRACTICE LEADER, QPA
- 3:05-3:15 pm** CLOSING COMMENTS
GLENN SPENCER CHIEF EXECUTIVE OFFICER, PRIME CAPITAL INVESTMENT ADVISORS / QPA