

WEDNESDAY, OCTOBER 14, 2020 | 10:00AM - 1:00PM CENTRAL



12th ANNUAL
QUALIFIED PLAN
FIDUCIARY SUMMIT

REGISTER HERE

[EARN UP TO 3 SHRM CREDITS]



QUALIFIED PLAN ADVISORS

VIRTUAL QUALIFIED PLAN FIDUCIARY SUMMIT
WEDNESDAY, OCTOBER 14, 2020 | 10:00AM - 1:00PM CENTRAL

AGENDA:

- 10:00am-10:40am** **DATA SECURITY - MORE IMPORTANT NOW THAN EVER BEFORE**
Moderated by Rob Massa, CHFC®, CEBS®, CPFA®, AIF®, CBC
Houston Area Retirement Practice Leader, Qualified Plan Advisors
Ted Schmelzle, J.D., CIPP
Senior Director, Plan Sponsor Services, Securian Financial Group
David Schneier, CISSP®
CTRPR, Principal Cyber Assurance and Support, Fidelity Investments
- 10:40am-11:15am** **PORTFOLIO MANAGEMENT - MANAGING TARGET DATE FUNDS & RISK-BASED PORTFOLIOS DURING TURBULENT MARKET TIMES**
Moderated by Mike Smoots, J.D.
ERISA Counsel, Qualified Plan Advisors
Eric Krause, CFA®
Portfolio Manager, Qualified Plan Advisors
Rich Weiss
Chief Investment Officer, Multi Asset Strategies, American Century Investments
Heather Zakian, CAIA
Institutional Portfolio Manager, Global Asset Allocation, Fidelity Investments
- 11:15am-11:50am** **PARTICIPANT WELLNESS - HOW EMPLOYERS & EMPLOYEES ARE RESPONDING TO GROWING DEMAND FOR WELLNESS**
Moderated by Scott Colangelo, AIF®
Chairman Qualified Plan Advisors
Christian Mango, AIFA®
President, Financial Fitness for Life
Jessica Ruggles
Director, Financial Wellness Outcomes Practice, Prudential Retirement
- 11:50am-12:30pm** **ERISA LITIGATION UPDATE - LITIGATORS DISH ON DEVELOPMENTS & PRACTITIONERS SHARE BEST PRACTICES**
Kim Jones, J.D., Glenn Merten, J.D., and Fred Reish, J.D.
of Faegre Drinker
Matthew Eickman, J.D., AIF®
National Retirement Practice Leader, Qualified Plan Advisors
- 12:30pm-1:00pm** **THE DOL & IRS HAVE BEEN BUSY! - LIFETIME INCOME, PEPs, & MORE**
Matt Condos
VP, Product Management, Lincoln Financial Group
Mike DiCenso
Executive VP, Business Development, Newport Group
Matthew Eickman, J.D., AIF®
National Retirement Practice Leader, Qualified Plan Advisors

YOU ARE INVITED TO A ZOOM MEETING.

WHEN: OCT 14, 2020 10:00 AM CENTRAL TIME (US & Canada)

[CLICK HERE TO REGISTER IN ADVANCE FOR THIS MEETING](#)

THANK YOU TO OUR SPONSORS

HOSTS



PRESENTERS



Financial **fit**ness for LifeSM

