

Thursday
January 29, 2025
11 am - 3 pm EST
Day 1 Agenda

11:00 am	Introduction Ary Rosenbaum
11:15 am	401(k) Plan Audit Findings: Common Causes and Practical Remedies, **MUN CPAs**
11:45 am	Break
12:00 pm	How Reduced Loss = Increased Returns **Brandywine**
12:30 pm	A Blue Ocean in the Small Market **401GO**
1:00 pm	Every Plan needs a Decumulation Process, **Pacific Life**
1:30 pm	From Leakage to Growth: How NextLevel IRA Can Help Advisors Retain Assets and Unlock Future Clients **PenChecks Trust**
2:00 pm	Year End Financial Planning For Business Owners **Blue Ridge Associates**
2:30 pm	Tales From That 401(k) Plan Provider Handbook **The Rosenbaum Law Firm**



Friday
January 30, 2025- 3
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Agenda
Day 2

11:00 an	Introduction	**Ary Rosenbaum**
11:15 am	Cyber InsuranceEssential Protection for RIAs, TPAs, and Recordkeepers	**Joe Crauso & Associates**
11:45 am	Break	
Noon	**That 401(k) Bunch**	
1:00 pm	Showing Your Value: The Benefits of Having an Advusir Service Agreement	**Invesco**
1;30 pm	My Purpose Plan - Advisor/Client Relationship Taken to the Next Level	**Synchronomics**
2:00 pm	Cash Balance Plans: When You're Done Pretending the 401(k) Will Do It	**BPAS**
2:30 pm	Creating Constructive Doubt: The Advisor's Playbook for Landing Retirement Plans	**Q3**