CFOP Conference Agenda

Wednesday, May 24, 2017

7:30 am to 8:15 am	Continental Breakfast/Check in
8:15 am to 8:30 am	Welcome and Introductions
8:30 am to 10:15 am	Legislative Update and the Fiduciary Proposal - **Bob Kaplan of VOYA Financial**
10:15 am to 10:30 am	Break
10:30 am to 12:15 pm	Automatic Enrollment & Plan Termination - **Bob Kaplan**
12:30 pm to 1:30 pm	Lunch on the Patio
1:30 pm to 2:30 pm	Secure Choice California - **Gary Allen of Prudent Investor Advisors, LLC** & *Gary Allen on Business* on KNBR in San Francisco.
2:30 pm to 2:45 pm	Break
2:45 pm to 3:45 pm	Retirement Plan Review - **Crystal Ekanayake of CliftonLarsonAllen LLP & Beth Harrington of Benefit Resources, Inc.**
3:45 pm to 4:00 pm	Break
4:00pm to 5:00 pm	Ethics - **Jim Paul of Paul Benefits Corp. & Marcel Weiland of Chang, Ruthenberg & Long PC**

*Details about sessions and workshops are provided on the following page.

Session and Workshop Details

General Legislative Update - Bob Kaplan

An overview of developments and trends affecting retirement plans from the perspective of plan sponsors, service providers, and fiduciaries. Recent developments from the regulatory agencies and Congress will be the focus.

Automatic Enrollment and Plan Terminations - Bob Kaplan

How do we get participants into a plan, and then what do we do when we need to close a plan down and get those participants out? Bob will have in depth discussion on automatic enrollment and plan terminations to conclude the morning. Bob will look at what auto enrollment is and how it works. He'll discuss what to look at when a plan terminates. (How it effects plan contributions, safe harbor and other compliance issues.)

Secure Choice - Gary Allen

Find out exactly what Secure Choice California is and what it means to our retirement industry in California. Gary Allen will discuss what Secure Choice is and how it affects the retirement plan industries, plus what the possible changes mean that are pending in congress. This will be an open discussion so be ready to bring your questions.

Retirement Plan Review Panel - Crystal Ekanayake, Beth Harrington & a Local Plan Sponsor

As a TPA, plan sponsor, fiduciary or advisor, do you know what to look for and review when you receive that auditor's report? As CPA, plan sponsor, fiduciary or advisor what to check in that Annual report you receive from the TPA or Record Keeper is accurate and has addressed the plan's compliance requirements?

Well, now you can. Come participate in a panel discussion with CPA Crystal Ekanayake of CliftonLarsonAllen LLP, TPA Beth Harrington of Benefit Resources, Inc., and a local Plan Sponsor. They will discuss how to review reports, notices and best practices for all those in the retirement industry.

Ethics in a World of Fake News - Jim Paul & Marcel Weiland

In this day and age, it is more important than ever to be ethical in business, to set standards for our industry and to have your own moral compass. Please join us for a lively discussion of ethics in our world, how to set good examples for your employees and clients, and how burnout can damage you and your business.

Come, sit, and have a glass of wine (or iced tea, if that is your choice). You will get your ethics credits, you will learn some things, and (hopefully) you will be entertained.

We then welcome you to stay after and enjoy the rest of your wine with some light appetizers.