**2019 Seattle Fiduciary Summit Agenda**

**Registration, Lunch & Networking** 11:00 – 11:20

**Retirement Plan Road Show Summit Introduction** 11:20 – 11:25

*Jon Freye, Founder & Managing Director – Xponential Growth Solutions*

**Raising the Bar: Defining Prudent Expert Standards** 11:25 – 11:55

*Bill Small, Co-Founder & Principal – Highland Capital Advisors*

*Dave Rowe, Senior Consultant, Equity Partner – Highland Capital Advisors*

**Plan Fiduciaries and Plan Qualification: Problem Avoidance and Fixes?** 11:55 – 12:25

*William D. Whitman, Attorney – Thorson Barnett & McDonald, P.C.*

**Break**  12:25 – 12:35

**Raising the Bar: Demystifying Select Institutional Investment Strategies – CIT’s** 12:35 – 12:55

*Sharad Vasanth, Vice President – BlackRock*

**Raising the Bar: Successful Plans – Design or Default** 12:55 – 1:20

*Sasha Franger, Director of Thought Leadership – Empower Retirement*

**Ask the Experts – Round Table Format** 1:20 – 2:50

1. *Sasha Franger, Empower – The Data Behind Better Outcomes*
2. *David Mann, Highland Capital Advisors – Sample RFP Templates & RFP Best Practices*
3. *Shawn Hansen, Clark Nuber – New Audit Standards Impacting Retirement Plans and Related Topics*
4. *Deborah Vince, NY Life – Stable Value Funds*
5. *Jennifer Schuessler, Empower – Can Automation and Defaults Help Older Employees, Too?*
6. *Dave Rowe, Highland Capital Advisors – Evaluating Reasonableness of Plan Fees*
7. *William D. Whitman & Jeff Curnutt, Thorson Barnett & McDonald, P.C. – Legal Update*
8. *Sharad Vasanth, BlackRock – DC Trends – What Large Companies Are Doing in the DC Space*
9. *Owen Kiernan, MFS – ESG Funds and the Economy*

**Wrap-Up + Plan Sponsor Evaluations + Q&A** 2:50 – 3:00

*Bill Small, Co-Founder & Principal – Highland Capital Advisors*

*Jon Freye, Founder & Managing Director – Xponential Growth Solutions*