

# 2021 AUSTIN HEALTHCARE & RETIREMENT PLAN SUMMIT

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## EVENT AGENDA

THURSDAY, SEPTEMBER 23rd

**11:00 am - 3:00 pm**

Luncheon + Workshop

**3:00 pm - 4:00 pm**

VIP Happy Hour (optional)



# EVENT AGENDA |

Registration, Lunch & Networking	11:00 - 11:20
Summit Introduction <i>Jon Freye, Founder &amp; Managing Director - Xponential Growth Solutions</i>	11:20 - 11:25
Agenda Overview <i>Allison Kaylor-Flink, CPFA, Senior Vice President - NFP</i> <i>Steve DiMarco, Vice President - NFP</i>	11:25 - 11:35
Retirement Plan Fees / MisCompliance / WellCents <i>Allison Kaylor-Flink, CPFA, Senior Vice President - NFP</i>	11:35 - 12:05
Update on Benefits Regulatory Reforms & Enforcement <i>Elizabeth Allen, Vice President, Benefits Compliance &amp; Counsel - NFP</i>	12:05 - 12:35
NFP Benefit Trends Report <i>Kim Heald, Voluntary Benefits, National Practice Leader - NFP</i>	12:35 - 1:05
Break	1:05 - 1:15
Executive Benefits <i>Tony Donofry, Vice President, Consulting Services - NFP Executive Benefits</i>	1:15 - 1:40
Fireside Chat with ERISA Attorney - Plan Sponsor Compliance Pitfalls <i>Christian Hancey, Partner - Nixon Peabody</i>	1:40 - 2:05
Auditor's Perspective: How to Identify & Fix Common Compliance Issues <i>Patrick Carvey, Partner - Holtzman Partners</i>	2:05 - 2:20
Cyber Security Risk Management <i>Mike D. Donnelly, RPLU, Managing Director - MDO</i>	2:20 - 2:50
Wrap-Up + Plan Sponsor Evaluations + Q&A <i>Allison Kaylor-Flink, CPFA, Senior Vice President - NFP</i> <i>Steve DiMarco, Vice President - NFP</i> <i>Jon Freye, Founder &amp; Managing Director - XGS</i>	2:50 - 3:00
VIP Happy Hour <i>Optional (our treat, you deserve it!)</i>	3:00 - 4:00

# Meet Our Guest Speakers



**Allison Kaylor-Flink**  
*CPFA, Senior Vice President - NFP*



**Steve DiMarco**  
*Vice President - NFP*



**Elizabeth Allen**  
*Vice President, Benefits Compliance & Counsel - NFP*



**Kim Heald**  
*Voluntary Benefits, National Practice Leader - NFP*



**Tony Donofry**  
*Vice President, Consulting Services - NFP Executive Benefits*



**Christian Hancey**  
*Partner - Nixon Peabody*



**Patrick Carvey**  
*Partner - Holtzman Partners*



**Mike D. Donnelly, RPLU**  
*Managing Director - MDO*

## YOU'RE EARNING CE CREDITS!

- ✓ 3 Hours CPE/CPA
- ✓ 3 Hours HRCI/SPHR/PHR/GPHR General Credit
- ✓ 3 Hours SHRM Professional Development Credits (PDCs)
- ✓ CEBS Eligible



# DON'T FORGET TO COMPLETE THE FEEDBACK FORM!

*Paper copies available, or scan the QR code below*



Be sure to fill out the Plan Sponsor Evaluation Form (paper copies available, or scan the QR code and follow the link) at the end of the Summit to review your experience, request additional materials, and schedule your appointment!

## CONTACT US

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