

The Retirement Advisor University
In Collaboration with UCLA Anderson Executive Education
Collins Center Building, 2nd Floor
110 Westwood Plaza
Los Angeles, CA 90095

Agenda E: Wednesday, November 6, 2019

Time	Topic	Facilitator
7:00 – 8:00 AM	Breakfast Served at the Collins Center, 2nd Floor	
8:00 – 8:30 AM	Morning Welcome & Messages	Steff Chalk, TRAU Keith Groya, UCLA Anderson
8:30 – 10:00 AM	TC-325 Distinguishing Your Practice Uncovering Alpha in the DC Market	Fred Barstein, TRAU
10:00 – 10:15 AM	Break – 15 Minutes	
10:15 – 11:45 AM	OP-250 Principals of Persuasion	Noah Goldstein, UCLA Anderson
11:45 – 12:30 PM	Working Boxed Lunch – 45 Minutes	
12:30 – 2:00 PM	MB-330 Key Public Policy Trends Affecting Retirement Plans	Tom Foster, MassMutual
2:00 – 2:15 PM	Break – 15 Minutes	
2:15 – 5:30 PM	MB-300 The Birkman Method	Bob McCann, UCLA Anderson
5:30 – 5:45 PM	Conclusion	Steff Chalk, TRAU
5:45 PM	Depart Collins Center – UCLA Anderson	
6:00 – 7:30 PM	Assembly at Luskin	

Courses, Speakers and Times are subject to change

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Agenda: Thursday, November 7, 2019

Time	Topic	Facilitator
7:00 – 8:00 AM	Breakfast Served at the Collins Center, 2nd Floor	
8:00 – 8:30 AM	Study Group Report & Discussion	Steff Chalk, TRAU
8:30 – 10:00 AM	MB-203 Building Strong Brands in Financial Services	Sanjay Sood, UCLA Anderson
10:00 – 10:15 AM	Break – 15 Minutes	
10:15 – 12:15 PM	OP-232 Decisions Under Risk and Uncertainty	Craig Fox, UCLA Anderson
12:15 – 12:45 PM	Working Boxed Lunch – 30 Minutes	
12:45 – 2:15 PM	MB-224 Managerial & Small Business Accounting	Eric Sussman, UCLA Anderson
2:15 – 2:25 PM	Break – 10 Minutes	
2:25 – 3:55 PM	MB-360 How Can We Help Our Future Selves?	Hal Hershfield, UCLA Anderson
3:55 – 4:05 PM	Break – 10 Minutes	
4:05 – 5:35 PM	MB-260 Thinking on Your Feet – Setting the Stage For Creative Thinking	Iris Firstenberg, UCLA Anderson
5:45 PM	Depart Collins Center – UCLA Anderson	
7:00 PM	Assembly: 1.On your own or with Providers. 2.(Merrill only Dinner with John Hancock @ STK W Hotel Los Angeles/W Beverly Hills	

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The Retirement Advisor University
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Change of Venue: UCLA Anderson at the Luskin Conference Center
 Laureate Lecture Hall, Level One
 425 Westwood Plaza
 Los Angeles, CA 90095

Agenda: Friday, November 8, 2019

Time	Topic	Facilitator
6:30 – 7:30 AM	Breakfast Buffet - Luskin Plateia Restaurant	
7:30 – 9:00 AM	TC-330 The Dramatic Rise of CITs in DC Plans	Val Ferrara, Wilmington Trust Fred Barstein, TRAU
9:00 – 9:15 AM	Break	
9:15 – 10:45 AM	MB-270 Using the TRAU Education in a Rapidly Changing Environment	Fred Barstein, TRAU Steff Chalk, TRAU
10:45 – 11:00 AM	Break (Box Lunches)	
11:00 – 11:45 AM	Proctored Campus Exam	
11:45 – 12:00 PM	Break	
12:00 – 2:00 PM	Proctored Designation Exam	

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