



Los Angeles, CA – Group Study Session
 The Retirement Advisor University (TRAU)
 Curriculum Levels 2 & 3



UCLA Luskin Conference Center – Optimist, Level 2
 425 Westwood Plaza
 Los Angeles, CA 90095
www.LCC.UCLA.edu 855 522 8252

Monday, November 6, 2017

Time	Topic	Facilitator
7:00 – 8:00 AM	Breakfast in Plateia Restaurant	
8:00 – 8:45 AM	Welcome	Steff Chalk, TRAU
8:45 – 9:45 AM	OP-239 Plan Health and Retirement Readiness	Steff Chalk, TRAU
9:45 – 10:00 AM	Break	
10:00 – 11:00 AM	OP-244 Understanding How to Evaluate Target Date Funds	Dorann Cafaro, Bdelium Inc. TRAU, Adjunct Lecturer
11:00 – 11:15 AM	Break	
11:15 – 12:15 PM	TC-250 What Does it Mean to be a Fiduciary	Steff Chalk, TRAU
12:15 – 1:30 PM	Break and Lunch in Plateia Restaurant	
1:30 – 2:30 PM	MB-220 Understanding Fee Benchmarking for Qualified Plans	Dorann Cafaro, Bdelium Inc. TRAU, Adjunct Lecturer
2:30 – 3:30 PM	OP-200 Understanding Investor Behavior – Behavioral Finance	Steff Chalk, TRAU
3:30 – 3:45 PM	Break	
3:45 – 4:45 pm	TC-219 Fundamentals of Cash Balance Plans	Rosemarie Panico-Marino The Private Bank TRAU, Adjunct Lecturer
4:45 – 5:00 PM	Conclusion	Steff Chalk, TRAU
5:00 – 6:00 PM	Self-study	
6:00 PM	Assembly	

Courses, Speakers and Times are subject to change



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Tuesday, November 7, 2017

Time	Topic	Facilitator
7:00 – 8:00 AM	Breakfast in Plateia Restaurant	
8:00 – 8:15 AM	TRAU GSS Intro & Discussion	
8:15 – 9:15 AM	TC-310 The Fundamentals of Non-Qualified Deferred Compensation Plans	Rosemarie Panico-Marino The Private Bank TRAU, Adjunct Lecturer
9:15 – 10:15 AM	MB-233 Fundamentals of Small Business Accounting	Steff Chalk, TRAU
10:15 – 10:30 AM	Break	
10:30 – 11:30 AM	OP-341 Revealing Viable Outcomes	Francesca Messano Mass Mutual TRAU, Adjunct Lecturer
11:30 – 12:45 PM	Break and Lunch – Box Lunches	
12:45 – 1:45 PM	OP-251 Financial Wellness: Helping Employees	Steff Chalk, TRAU
1:45 – 2:45 PM	OP-233 Having Enough Money to Retire and Making it Last	Mark Lowbridge, John Hancock TRAU, Adjunct Lecturer
2:45 – 3:00 PM	Program Close	Steff Chalk, TRAU
3:00 – 3:15 PM	Break	
3:15 – 5:15 PM	C(k)P Designation Examination <i>Those not sitting for the C(k)P Designation Examination may leave after Program Closing</i>	Steff Chalk, TRAU

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