



Adjunct Lecturer Training – Jupiter, Florida
 The Plan Sponsor University (“TPSU”)



PGA National Resort & Spa

400 Avenue of the Champions
 Palm Beach Gardens, FL 33418
 Meeting Location: Congressional

www.pgaresort.com (800) 633-9150

Tuesday, January 8, 2019

Time	Topic	Facilitator
12:00 – 1:00 PM	Lunch	
1:00 – 2:00 PM	How TPSU Works	Fred Barstein, TPSU Steff Chalk, TPSU
2:00 – 3:00 PM	Logistics, Site Selection & Funding	Steff Chalk, TPSU Dr. Isabella Wagner, TPSU Elizabeth Youngs, TPSU
3:00 – 3:15 PM	Break	
3:15 – 4:00 PM	Panel of Adjunct Lecturer Support Staff	Adjunct Lecturer Support Staff
4:00 – 4:30 PM	Statistics, Best Practices & Plans for 2019	Fred Barstein, TPSU Steff Chalk, TPSU
5:30 – 7:30 PM	Assembly TBD	

Courses, Speakers and Times are subject to change



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Wednesday, January 9, 2019

Time	Topic	Facilitator
7:30 – 8:30 AM	Breakfast Buffet	
8:30 – 9:30 AM	Industry Trends & TPSU Plans for 2019	Fred Barstein, TPSU
9:30 – 10:00 AM	Review 2018 & 2019 Improvements	Fred Barstein, TPSU
10:00 – 10:15 AM	Break	
10:15 – 11:15 AM	Panel – Preparation for a Successful Program	
11:15 – 12:15 AM	Panel – Partnering with Providers	
12:15 – 1:15 PM	Working Lunch	
1:15 – 2:15 PM	Panel – Partnering with Advisors – Provider Perspective	
2:15 – 3:15 PM	Panel – Program Follow-up w/Attendees	
3:15 – 3:30 PM	Break	
3:30 – 4:00 PM	Ways to Improve in 2019	Fred Barstein, TPSU Steff Chalk, TPSU
4:00 – 4:15 PM	Close	

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