



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

Wednesday, November 7, 2018

Time	Topic	Facilitator
7:00 – 8:00 AM	Breakfast Served at the Collins Center	
8:00 – 8:45 AM	Morning Welcome & Messages	Steff Chalk, TRAU Keith Groya, UCLA Anderson
8:45 – 10:15 AM	TC-325 Discovering The New Alpha in the DC Market	Fred Barstein, TRAU
10:15 – 10:30 AM	Break	
10:30 – 12:15 PM	OP-232 Decisions Under Risk & Uncertainty	Craig Fox, UCLA Anderson
12:15 – 12:45 PM	Working Boxed Lunch	
12:45 – 2:15 PM	MB-330 Key Public Policy Trends Affecting Retirement Plans	Tom Foster, MassMutual
2:15 – 2:30 PM	Break	
2:30 – 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 – 7:45 PM	Assembly w/ refreshments at Luskin Plateia Courtyard	

Courses, Speakers and Times are subject to change

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Thursday, November 8, 2018

Time	Topic	Facilitator
7:00 – 8:00 AM	Breakfast Served at the Collins Center	
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	
10:15 – 12:15 PM	OP-250 Principles of Persuasion	Noah Goldstein, UCLA Anderson
12:15 – 12:45 PM	Working Boxed Lunch	
12:45 – 2:15 PM	MB-224 Managerial & Small Business Accounting	Eric Sussman, UCLA Anderson
2:15 – 2:30 PM	Break	
2:30 – 3:50 PM	TC-360 Creating & Running a Successful Retirement Committee	Steff Chalk, TRAU
3:50 – 4:00 PM	Break	
4:00 – 5:30 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	Dinner On your own or with Providers (Merrill Lynch Dinner with John Hancock @ STK W Hotel Westwood)	

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The Retirement Advisor University
 Collaboration with UCLA Anderson Executive Education
 UCLA Anderson at the Luskin Conference Center
 Laureate Lecture Hall, Level One
 425 Westwood Plaza
 Los Angeles, CA 90095

Friday, November 9, 2018

Time	Topic		Facilitator
6:30 – 7:30 AM	Breakfast	Served at Luskin Plateia Restaurant	
7:30 – 9:00 AM	TC-330	The Dramatic Rise of CITs in DC Plans	Robert Barnett, 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 will be available)		
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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