



October 22, 2019

## 28<sup>th</sup> ANNUAL 401(k) CLASS & UPDATE

### Agenda

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|-------------|---------|--|
| 8:30 – 8:40 | 10 min. | <ul style="list-style-type: none"><li>• Introduction &amp; History of PPA .....Bobby Arkills</li><li>• Thank Sponsors</li><li>• Welcome Affiliate Companies</li><li>• Introduction of Tony Panagiotu</li></ul> |
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#### Session I:

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| 8:40 – 9:10  | 30 min. | Tony Panagiotu – Overview & Technical (Distributions)                  |
| 9:10 – 9:20  | 10 min. | Kevin Rangel – M2 Trust Services                                       |
| 9:20 – 9:55  | 35 min. | Tony Panagiotu – Technical (Contributions)                             |
| 9:55         |         | Bobby Arkills to Introduce American Funds Speaker                      |
| 9:55 – 10:15 | 20 min. | Jeff Hunkins – American Funds<br>“Active vs. Passive Asset Management” |
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| 10:15 – 10:30 | 15 min. | Break Announced by Bobby Arkills<br>Welcome Back/Reintroduce Tony .....Bobby Arkills |
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#### Session II:

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| 10:30 – 11:05 | 35 min. | Tony Panagiotu – Technical (Design, Design, Design) <ul style="list-style-type: none"><li>• HCEs</li><li>• Compensation</li><li>• Discrimination Tests</li><li>• Safe Harbor</li><li>• Employer Contributions<ul style="list-style-type: none"><li>○ Match</li><li>○ Profit Sharing</li></ul></li><li>• Vesting &amp; Last Day Provisions</li></ul> |
| 11:05         |         | Bobby Arkills to Introduce John Hancock Presenter   |
| 11:05 – 11:25 | 20 min. | Thom Shola – John Hancock<br>“Cybersecurity”  |
| 11:25 – 12:00 | 35 min. | Tony Panagiotu – Technical (CB Plans, Fiduciary Requirements, Etc.)<br>CLOSE  |