

2024 DENVER SUMMIT AGENDA



12:30pm

Registration

1:00-1:15

Kickoff and Agenda

Sean Clancy, CPWA®, AIF®, Denver Managing Director



1:15- 2:00

Plan Litigation, Cybersecurity, & Legislative Guidance

Charles Smith, JD, Nebraska Retirement Practice Leader



2:00- 2:50

Fiduciary Innovations: Advisor Managed Accounts, In-Plan Income, Pooled Employer Plans

Brad Weber, AIF®, CPFA®, Regional Vice President - The Standard

Ken Munro, National Sales Director - Empower

Mark Demyanovich, Regional Vice President - Ascensus



2:50-3:10

Break

3:10- 3:40

Translating the Markets

Eric Krause, CFA®, PCIA/QPA

Matt Waters, CFP®, AIF®, PCIA/QPA



3:40- 4:20

Purposeful Communications - Go See The People!

Moderated by Terra McBride, MBA, Chief Marketing Officer - PCIA/QPA

David Scott, SHRM-SCP, Construction Industry Advocate - Encore Electric

Angela Roth, Total Rewards Manager - Soil Nail Holdings



4:20- 5:00

Retirement, Past and Future

Scott Colangelo, AIF®, Chairman and Managing Partner, QPA



5:00-7:00

Networking and Entertainment

Drinks and Light Appetizers Served



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