



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

Wednesday, May 2, 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, Mass Mutual
2:15 – 2:30 PM	Break	
2:30 – 5:30 PM	MB-300 The Birkman Method	Michael Sacks, Emory University
5:30 – 5:45 PM	Conclusion	Steff Chalk, TRAU
5:45 PM	Depart Collins Center – UCLA Anderson	
6:00 – 7:45 PM	Reception	

Courses, Speakers and Times are subject to change

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Thursday, May 3, 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	OP-350 Fiduciary Training for DC Investment Committees	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
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 UCLA Anderson at the Luskin Conference Center
 Laureate Lecture Hall, Level One
 425 Westwood Plaza
 Los Angeles, CA 90095

Friday, May 4, 2018

Time	Topic		Facilitator
6:30 – 7:30 AM	Breakfast	Served at Luskin Plateia Restaurant	
7:00 – 9:20 AM	TC-330	The Dramatic Rise of CITs in DC Plans	Robert Barnett, TRAU Fred Barstein, TRAU
9:20 – 9:30 AM	Break		
9:30 – 10:30 AM	MB-270	Using the TRAU Education in a Rapidly Changing Environment	Steff Chalk, TRAU
10:30 – 10:45 AM	Break		
10:45 – 11:30 AM	Proctored Campus Exam		
11:30 – 12:00 PM	Break		
12:00 – 2:00 PM	Proctored Designation Exam		

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