

<b>Wednesday November 2nd - Day 1: UCLA Anderson Executive Education</b>			
7:00	8:00		Breakfast: Served at the Collins Center
8:00	8:45		Morning Welcome & Messages - Fred Barstein & Kelly Bean
8:45	9:45	TC-325	Discovering The New Alpha In The DC Market - Fred Barstein
9:45	10:00		Break
10:00	11:30	OP-232	Decisions Under Risk & Uncertainty - Craig Fox
11:30	1:00		Study Group Discussion & Report Over Lunch (4 Groups Meet & Report on Key Points & Practical Applications)
1:00	2:00	OP-239	How To Develop & Implement A Results Driven Participant Education Program - Hugh O'Toole
2:00	2:30		Break
2:30	5:30	MB-300	Leadership: The Birkman Method - Kelly Bean
5:30	5:45		Conclusion of the day: Feedback, Evaluations & Announcements
6:00	7:00	Light Reception at Hotel Palomar	
7:00	9:00	Dinner at Hotel Palomar - Networking - Dinner Sponsored by Franklin Templeton	
<b>Thursday November 3rd - Day 2: UCLA Anderson Executive Education</b>			
7:00	8:00		Breakfast: Served at the Collins Center
8:00	8:30		Study Group Discussion & Report On Birkman Method - Kelly Bean
8:30	10:00	MB-203	Building Strong Brands In Financial Services - Sanjay Sood
10:00	10:45		Break & Study Group Discussion & Report on Building Strong Brands In Financial Services
10:45	11:45	MB-201	Best Practices of Successful Financial Advisors - Warren Cormier
11:45	12:30		Lunch
12:30	2:00	MB-223	Managerial & Small Business Accounting - Eric Sussman
2:00	2:15		Break
2:15	3:15	TC-200	Managing ERISA Fiduciary Risk - A Sea of Change - Bob Rafter
3:15	4:00		Break & Study Group Discussion & Report on Managerial & Small Business Accounting
4:00	5:30	TC-211	Regulatory Trends & Update - John Carl Includes Discussion With Don Trone & Bob Rafter
5:15	5:45		Conclusion of the day: Feedback, Evaluations & Announcements
6:00	7:00	Reception at UCLA Hall of Champions In The Athletics Hall Of Fame	
		Sponsored Dinners Off Site	
<b>Friday November 4th - Day 3: The Hotel Palomar</b>			
7:00	8:00		Breakfast: Hotel Palomar - Same Location As Reception & Dinner
8:00	8:15		Morning Messages & Welcome
8:15	9:15	TC-221	Introduction To 401(k) Ethos - Donald Trone
9:15	9:30		Break
9:30	10:30	SM-223	Finals Presentations: Stand Out & Differentiate - Steff C. Chalk
10:30	10:45		Break
10:45	11:30		Case Study Preparation - Small Groups Will Begin Work on The Case Study Required For All C(k) P Designation Candidates
<b>* 11:30 &amp; 12:30* Transportation to LAX Provided From Hotel - Leaves From Front of Hotel **</b>			