

The Retirement Advisor University,
in collaboration with UCLA Anderson Exec Edu
November 8, 9 & 10, 2023 / **AGENDA**



Wednesday, Nov 8	Thursday, Nov 9	Friday, Nov 10
Collins Center for Executive Education	Collins Center for Executive Education	TRAU at Luskin Conference Center
7:00 - 7:45 a.m.	7:00 - 7:45 a.m.	7:00 - 7:55 a.m.
Breakfast: Luskin Conf Center: Plateia	Breakfast: Luskin Conf Center: Plateia	Breakfast: Luskin Conf Center: Plateia
Morning Refreshments & Boxed Lunches in Breakroom	Morning Refreshments & Boxed Lunches in Breakroom	Morning Refreshments & late a.m. Boxed Lunches available
UCLA Anderson: Collins Center, 2nd Floor	UCLA Anderson: Collins Center, 2nd Floor	Luskin: Laureate Lecture Hall: Lobby Level
8:00 - 8:30 a.m.	8:00 - 8:15 a.m.	8:00 - 9:30 a.m.
Welcome, Opening Remarks & Logistics	Insight & Observations	MB-325: Current Industry Court Cases
Donna Sharp, UCLA Anderson	Dan Hall, TRAU	Fred Reish, Esq., Partner
Dan Hall, TRAU		Faegre Drinker Biddle & Reath
8:30 - 10:15 a.m.	8:15 - 9:45 a.m.	
TC-325: Distinguishing Your Practice	MB-203: Building Strong Brands	
Uncovering The Alpha In The DC Market	in Financial Services	
Fred Barstein, TRAU	Sanjay Sood, UCLA Anderson	
10:15 - 10:30 a.m. - Break	9:45 - 10:00 a.m. - Break	9:30 - 9:50 a.m. - Break
10:30 - 12:30 p.m.	10:00 a.m. - 12:00 Noon	9:50 - 10:50 a.m.
OP-232: Decisions Under Risk & Uncertainty	Data Visualization: Influence with Insights	MB-270: Using The TRAU Education in a
Craig Fox, UCLA Anderson	Stephen Spiller, UCLA Anderson	Rapidly Changing Environment
		Fred Barstein, TRAU
		Dan Hall, TRAU
12:30 - 1:00 p.m. - Working Lunch	12:00 - 12:30 p.m. - Working Lunch	10:50 - 11:30 a.m. - Boxed Lunches
		To enjoy at Luskin or for the Road
1:00 - 3:15 p.m.	12:30 - 1:30 p.m.	
MB-300: The Birkman Method	MB-330: Washington Update:	
Robert McCann, UCLA Anderson	Claire Rowland, Esq., Morgan Lewis	
3:15 - 3:30 p.m. - Break	1:30 - 3:30 p.m.	<i>This schedule and agenda is subject to change</i>
	Reframing: A Tool For Innovation	<i>and breaks will be available throughout.</i>
	Olav Sorenson, UCLA Anderson	
3:30 - 5:00 p.m.	3:30 - 3:45 p.m. - Break	
MB-260: Bringing the Future to the Present		
Iris Firstenberg, UCLA Anderson	3:45 - 5:00 p.m.	
	Happier Hour	
	Cassie Holmes, UCLA Anderson	
5:00 - 5:30 p.m.	5:00 - 5:30 p.m.	
Conclusion / Announcements	Conclusion / Announcements	
Dan Hall, TRAU	Dan Hall, TRAU	
6:15 - 8:00 p.m. - Evening Social	6:15 p.m. - Happy Hour	Safe Travels & Happy Holidays!
Evening Social / Dinner	Luskin Lounge or Courtyard - TBD	
Hosts: Voya Financial/	Host: John Hancock	
Neuberger Berman/American Century		