

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 4, 2022 AGENDA (Subject To Change)

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 Distinguishing your Practice Uncovering Alpha in the DC Market	Fred Barstein, TRAU
10:15 – 10:30 AM	Break	
10:30 – 12:30 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-203 Building Strong Brands in Financial Services	Sanjay Sood, UCLA Anderson
2:15 – 2:30 PM	Break	
2:30 – 5:30 PM	MB-300 The Birkman Method	Bob McCann, UCLA Anderson
5:30 – 5:45 PM	Conclusion	Steff Chalk, TRAU
5:45 PM	Depart Collins Center – UCLA Anderson	
6:15 – 7:45 PM	Assembly w/ Luskin Plateia Courtyard	Confirm Pending

Courses, Speakers and Times are subject to change

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Thursday, May 5, 2022 AGENDA (Subject To Change)

Time	Topic		Facilitator
7:00 – 8:00 AM	Breakfast	Served at the Collins Center	
8:00 – 9:30 AM	MB-360	How Can We Help Our Future Selves?	Hal Hershfield, UCLA Anderson
9:30 – 10:00 AM	Break		
10:00 - 11:30 AM	MB-224	Managerial & Small Business Accounting	Eric Sussman, UCLA Anderson
11:30 – 12:30 PM	Working Box Lunches		
12:45 - 2:45 PM	OP-250	Principles of Persuasion <i>(Course Scheduling Adjustment Pending)</i>	Noah Goldstein, UCLA Anderson
2:45 – 3:00 PM	Break		
3:00 - 4:00 PM	Course Details Pending		
4:00 – 5:30 PM	MB-260	Thinking on Your Feet – Setting the Stage For Creative Thinking	Iris Firstenberg, UCLA Anderson
5:30 PM	Depart Collins Center – UCLA Anderson		
	No Evening Activities Planned At This Time		

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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 6, 2022 AGENDA (Subject To Change)

Time	Topic	Facilitator
6:30 – 7:30 AM	Breakfast Buffet - Served at Luskin Plateia Restaurant	
7:30 – 9:00 AM	TC-330 The Dramatic Rise of CITs in DC Plans	Robert Barnett, Wilmington Trust Fred Barstein, TRAU
9:00 – 9:15 AM	Break	
9:15 – 10:45 AM	MB-270 Using the TRAU Education in a Rapidly Changing Environment	Fred Barstein, TRAU Steff Chalk, TRAU
10:45 – 11:00 AM	Break (Box Lunches will be available)	
11:00 – 11:45 AM	Proctored Campus Exam	
11:45 – 12:00 PM	Break	
12:00 – 2:00 PM	Proctored Designation Exam	

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