RPA
RETIREMENT PLAN ADVISORS
THE FUTURE IS BETTER THAN YOU THINK

Trustee University

Tuesday, October 7, 2025
DoubleTree by Hilton, Ballroom A
16625 Swingley Ridge Road, Chesterfield, MO 63017

$50 per attendee
Complimentary for RPA clients

AGENDA

- **11 AM - 12 PM: Trustee Roles & Responsibilities**
  RPA Financial Advisor Dan Harden, CFP, ChFC
  For first-year trustees, to meet JCPERS minimum requirements.
  Returning trustees are welcome to attend.

- **12 - 1 PM: Lunch & Registration**

- **1 - 1:05 PM: Welcome**

- **1:05 - 1:40 PM: Update on the Markets: Where Do We Go from Here?**
  RPA Chief Investment Officer T.J. Kistner, CFA, CAIA & Wellington Management Multi-Asset Strategist Nanette Abuhoff Jacobson
  Key topics that impact financial markets and working Americans saving for retirement.

- **1:40 - 2:10 PM: Cybersecurity**
  Nationwide Senior Consultant on Cyber Technology Risk Roy Gilliam
  Ever-evolving risks to consider in our digital world, with a focus on new risks from AI.

- **2:10 - 2:40 PM: What's Next for DC Plan Asset Classes**
  RPA Financial Advisor Andy Trachsel, CFA, CPA
  As regulators explore allowing private equity and private credit vehicles in retirement plans, participants continue to ask about crypto and gold as they both make new highs. Let's explore how these investments may, or may not, work in employer-sponsored retirement plans.

- **2:40 - 2:55 PM: SECURE Act Update: Age-Based Catch-Ups & More**
  RPA Director of Plan Consulting Tamme Ford
  The latest information plan sponsors need to know regarding this legislation.

- **2:55 - 3 PM: Closing Remarks**

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