

# Agenda

## Client Conference Agenda

May 9-11, 2018

Wednesday, May 9

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**2:00pm** Registration

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**4:00pm** Welcome

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**4:15pm** **Keynote Address: No Barriers**  
*We all face personal and professional barriers in life which keep us from reaching our true potential. Erik Weihenmayer, the only blind man to summit Mount Everest, will take us on his personal journey around the world and inspire us to explore and lead a "No Barriers" life.*

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**5:30pm** Break

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**6:30pm** Reception and Dinner

Thursday, May 10

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**7:30am** Breakfast

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**8:30am** **Futurist Perspectives**  
*Learn about key future trends shaping technology, customers, science and business followed by a deeper discussion around the behavioral science and socio economics behind these headwinds. We will discuss the challenges of delivering financial wellness in an uncertain world and need for changing behaviors.*

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<b>9:40am</b>	<b>Update from Washington</b> <i>Harry Dalessio, Head of Full Service Solutions, will facilitate a discussion with Andy Friedman, Principal of The Washington Update, on how the ever-shifting political, legislative and regulatory dynamics in Washington are impacting the retirement industry.</i>
<b>10:20am</b>	Break
<b>10:45am</b>	<b>Our Focus</b> <i>Phil Waldeck, President, Prudential Retirement, will carry forward a message of future trends shaping the workplace, the challenges we face and Prudential's current mission to prepare.</i>
<b>11:10am</b>	<b>Breaking Down the Barriers to Financial Security</b> <i>Prudential's approach of integrating employer and employee wellness solutions that will help clients and participants achieve their strategic goals.</i>
<b>Noon</b>	Lunch
<b>1:00pm</b>	<b>The Voice of the Plan Sponsor</b> <i>Hear industry case studies from a panel of clients on specific financial wellness challenges and how they are incorporating solutions.</i>
<b>1:45pm</b>	Break
<b>2:00pm</b>	<b>Achieving New Heights Breakout Session 1</b> <i>Join your peers in an interactive breakout session focused on breaking down barriers to achieve financial wellness solutions.</i>
<b>3:00pm</b>	<b>Achieving New Heights Breakout Session 2</b>
<b>4:00pm</b>	<b>No Barriers: Your Ropes Team</b> <i>Harry Dalessio, Head of Full Service Solutions, will share Prudential's commitment to our clients in preparing for long-term financial security for all Americans.</i>

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**6:00pm** Dinner Adventure at Ngala Wildlife Preserve

Friday, May 11

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**8:00am** Breakfast

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**9:00am** **Achieving New Heights Breakout Session 3**  
*Join your peers in an interactive breakout session designed to provide tools that will bring inspiration and energy to the continued journey of wellness.*

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**10:30am** **Reaching the Summit: Conference Closing**

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**11:15am** Departures and Optional Networking Activities

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**2:00pm** Optional Networking Activities Conclude

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# 2018 Client Conference

## Wednesday, May 9 – Friday, May 11, 2018

### ATTENTION: GOVERNMENTAL CLIENTS

Prudential Retirement will be hosting the 2018 Client Conference on May 9 - 11, 2018. This event will offer key decision makers a wealth of educational and peer networking opportunities in a focused, but comfortable setting. This year both conferences will be held at The Ritz-Carlton Beach Resort, Naples, FL. To view the agenda, please reference the Agenda link on the conference website or registration page

Prudential Retirement proposes to assume reasonable and customary costs related to your representative's attendance at this event including meals and ground transportation to and from the Southwest Florida International Airport (RSW).

Designation of your representative to attend the **2018 Client Conference** should be made by you as the Plan Sponsor. We suggest that the type of person you may want to consider is someone who works on corporate or executive strategy issues.

#### Logistics to Consider:

##### **Wednesday, May 9:**

Meeting and Dinner: 2:00p.m. - 9:00 p.m.

##### **Thursday, May 10:**

Breakfast, Meetings, Dinner: 8:00 a.m. – 9:00 p.m.

##### **Friday, May 11:**

Breakfast, Meeting, Networking Activities: 8:00 a.m. – 2:00 p.m.

#### **Estimated Value/Cost**

\$2,018.00

#### **VALUE/COST**

In consideration of your organization's commitment to participate in this meeting, Prudential proposes, as an in-kind contribution to your retirement plan, to assume reasonable and customary expenses for transportation, lodging, meals and entertainment in connection with these meetings. Given the level of expense associated with the meeting in Naples, FL, which could total \$2,018, we recognize that both you and we will need to ensure that this proposal receives your organization's review and approval. In this connection, we would ask that this proposal be approved in writing by the retirement plan's board or a senior plan officer or governmental official, as appropriate. Please keep in mind that your organization will need to cover travel cost other than ground transportation to/from the airport.

We ask that you review this proposal with any legal or ethics personnel that support your organization in order to confirm that our proposed in-kind contribution would be viewed as such, and not as a gift or benefit to your representative, and that there would be no inadvertent and unintended violation of any applicable laws, regulations or internal policies relating to ethics, conflict of interest or gifts and entertainment.

ACTION REQUIRED:

If this proposal is acceptable, please provide your plan's Prudential Retirement representative with written approval from an appropriate officer of your organization. Please provide this written approval by May 1, 2018. Mail to:

Claire Voaden, Senior Meeting Manager  
280 Trumbull St. -H20D  
Hartford, CT 06103  
Email: [claire.voaden@prudential.com](mailto:claire.voaden@prudential.com)