**2024 Cerrado Group Annual Meeting Agenda**

**Sunday, Aug. 18**

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|  | **Arrivals throughout the Day** | *Ritz Carlton Fort Lauderdale* |
| 6:00- 9:00pm | **Dinner**  ***Sponsored by Lee CPA***  James Lee | *Steak 954*  *401 North Fort Lauderdale Blvd.*  *Azul Room* |

**Monday, Aug. 19**

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| 8:00-9:00am | **Breakfast**  ***Sponsored by Voya***  Cassie Churchill, TPA National Vice President | *Beechwood Room* |
| 9:00-9:15am | **Welcome and Agenda Overview**  Ann Slotwinski | *Ferncliff Room* |
| 9:15 – Noon | **Open Discussion**   * MAP Retirement * TCG Communication * Who are we and where are we going * 2,3,5 year vision * ROI * Governance |  |
| 10:30am -10:45am | **Break** |  |
| 10:45 – Noon | **Open Discussion Continued** |  |
| Noon to 1:00pm | **Lunch**  ***Sponsored by Empower***  Philip Gould  Michelle Condou  National Accounts Directors, TPA | *Beechwood Room* |
| 1:00- 2:30pm | **Employee Survey**  Business Health  Rod Bertino  Nick Zapf  Parrish Pettey  Pat Shelton  Amy Udemme  Ann Slotwinski | *Ferncliff Room* |
| 2:30- 2:45pm | **Break** |  |
| 2:45pm – 3:45pm | **Marketing Committee Report Back**  Leslie O’Bryan  Forrest Knowles  Jonathan Haslauer  Bob Carroll  Ann Slotwinski |  |
| 3:45pm – 4:00pm | Transition to Sponsor Session |  |
| 4:00pm – 5:00pm | **Sponsor Session**  Ann Slotwinski | *Astor 1* |
| 6:00-9:00pm | **Sponsor Thank You Dinner**  ***Hosted by The Cerrado Group***  ***Attendees are responsible for their own transportation*** | *Mulka Residence*  *3240 Oleander Way*  *Lauderdale by the Sea* |

**Tuesday, Aug. 20**

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| 8:00-9:00am | **Breakfast**  ***Sponsored by Transamerica***  Lara Hise, Senior Manager, TPA Business Development  Perry Lazarus, S Florida Wholesaler | *Beechwood Room* |
| 9:00-10:30am | **Process Committee Report Back**  Amy Haddan  Jill Dennis  Debbie Zimmer  Bryan Jones  Ann Slotwinski | *Ferncliff Room* |
| 10:30-10:45am | **Break** |  |
| 10:45am -Noon | **ECO Reboot**  Ann Slotwinski  Parrish Pettey  Debbie Zimmer  Pat Shelton  Amy Haddan  Nick Zapf |  |
| Noon – 1:00pm | **Lunch**  ***Sponsored by The Standard***  Matt King, National Direcytor, TPA Connection and Business Development  Trevor Roberts, National TPA Sales Manager | *Beechwood Room* |
| 1:00-2:00pm | **Tech Committee Report back**  Mike Mulka  Joe Burt  Jordan Cross  Matt Slyter  Ann Slotwinski | *Ferncliff Room* |
| 2:00- 3:00 | **Show and Tell**  Rev Share Calc-Pat Shelton  Proposal System- Joe Burt |  |
| 5:45pm | **Meet in hotel Lobby to walk to the restaurant** |  |
| 6:00- 9:00pm | **Off Site Dinner**  ***Sponsored by Penchecks***  Laurie Kemp  Tim Loehr  John Maury  Regional Directors | *Casablanca Café*  *3049 Alhambra Street*  Fireplace Room |

**Wed., Aug. 21**

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| 8:00-9:00am | Breakfast  ***Sponsored by CUNA***  Stacey Scott  Director, TPA Business Development | *Beechwood Room* |
| 9:00-9:30am | **Nationwide**  Kirk Smith, National Account Manager  Kevin Seimet, AVP Strategic Accounts – Retirement Solutions & Advisory Markets  ***Lunch Sponsor*** | *Ferncliff Room* |
| 9:30- 10:15pm | **Membership Strategy and Tactics**  **2025 Projects and Committees**  Ann Slotwinski |  |
| 10:15am -10:30am | **Break** |  |
| 11:00am – Noon | **Open Session**   * Outsourcing * What Else |  |
| Noon – 1:00pm | **Lunch** | *Beechwood Room* |