

**Wednesday, February 14<sup>th</sup>, 2024**

8:00 a.m. to 2:00 p.m.

Location:

**University of Denver**

**Fritz Knoebel School of Hospitality**

2044 E. Evans Ave., Suite 222

**Denver, CO 80210**

Tuscan Ballroom

Adjunct Lecturer Presenting:

**Mark Tonelli – Managing Director**

**HUB International**

**Agenda – The Plan Sponsor University**

*The C(k)PF / The Certified 401(k) Plan Fiduciary Designation*

8:00 – 8:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
8:30 – 8:50	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:50 – 9:50	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>Behavioral Finance &amp; Retirement Readiness, Participant Outcomes</b> <i>Mark Tonelli – HUB International</i>
9:50 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Top Defined Contribution (DC) Trends and Developments</b> <i>Matt Sommer – Janus Henderson Investors</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Mark Tonelli – HUB International</i> <u>Panelists:</u> <i>Mark Feeney – AllianceBernstein</i> <i>Richard Merson – PIMCO</i> <i>Nicholas Reed – Goldman Sachs</i> <i>Matt Wenzlaff – T. Rowe Price</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch</b>
11:50 – 1:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>James Allen – Principal Financial Group, Zachary Creegan – PGIM</i> <i>Jeff Dickin – John Hancock, Jessen Fahey – Cohen &amp; Steers</i> <i>Nicholas Reed – Goldman Sachs, Jessica Wilson – Franklin Templeton</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		