

**TPSU**THE PLAN SPONSOR  
UNIVERSITY

**Thursday, October 17, 2024**  
**8:00 a.m. - 2:00 p.m.**

Location:

**Wylie Center & Tupper Manor**

Endicott College  
 295 Hale Street  
**Beverly, MA 01915**  
 Newburyport

Adjunct Lecturers Presenting:

**Michaela Scott, C(k)P®****The Strategic Retirement Benefits Group**

| <b>The Plan Sponsor University – Agenda</b><br><i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> |                                      |  |
|--|--------------------------------------|--|
| 8:00 – 8:30  | <b>Breakfast / Registration</b>      | <b>Registration &amp; Sign-in</b>  |
| 8:30 – 8:55  | <b>Introduction</b>                  | <b>Introduction to The Plan Sponsor University</b><br><i>Fred Barstein, C(k)P – The Plan Sponsor University</i>  |
| 8:55 – 9:55  | <b>Session 1</b>                     | <b>Presentation by the Adjunct Lecturers</b><br><b>Producing Outcomes and Staying Compliant</b><br><i>Michaela Scott, C(k)P – The Strategic Retirement Benefits Group</i>  |
| 9:55 – 10:05   | <b>Break</b>                         |  |
| 10:05 – 10:50  | <b>Session 2</b>                     | <b>Keynote Presentation</b><br><b><i>Fiduciary Fundamentals – Demystifying Your Obligation to Retirement Plan Participants</i></b><br><i>Sue Walton – Capital Group / American Funds</i>   |
| 10:50 – 11:35  | <b>Session 3</b>                     | <b>Panel Discussion with Industry Professionals</b><br><u>Moderator:</u> <i>Michaela Scott, C(k)P – The Strategic Retirement Benefits Group</i><br><u>Panelists:</u><br><i>Allen Ehling – Fidelity Investments</i><br><i>Ryan Fay – John Hancock</i><br><i>Todd Mann – Alliance Bernstein</i><br><i>Alan Valenca – T. Rowe Price</i> |
| 11:35 – 11:50  | <b>Break</b>                         | <b>Pick up your Lunch</b>  |
| 11:50 – 1:15   | <b>Session 4<br/>(Working Lunch)</b> | <b>What is Working in Today's 401(k) Plans?</b><br><b>What is Not Working in Today's 401(k) Plan?</b><br><u>Group Discussion Leaders:</u><br><i>Jeff Beauregard, C(k)P – Transamerica</i><br><i>Seth Masters – The Standard</i><br><i>Michael Pisano – Fidelity Investments</i><br><i>Dan Zibaitis – John Hancock</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>   |

*Agenda is Subject to Change*