

Wednesday, February 26th, 2025

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

Location:

NOVA Southeastern University

Alvin Sherman Library

3100 Ray Ferrero Jr. Blvd

Fort Lauderdale, FL 33314

2nd Floor, The Gallery Room

Adjunct Lecturer Presenting:

Shir McGettigan, C(k)P®

HUB Retirement and Wealth Management

The Plan Sponsor University – Agenda		
<i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast / Registration	Registration & Sign-in <i>Breakfast sponsored by Ascensus</i>
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:55 – 9:55	Session 1	Presentation by Adjunct Lecturer Financial Wellness in the Workplace <i>Shir McGettigan, C(k)P® – HUB Retirement and Wealth Management</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Fiduciary Fundamentals <i>Jonathan Young – Capital Group / American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Shir McGettigan, C(k)P® – HUB Retirement and Wealth Management</i> <u>Panelists:</u> <i>Claudine Nelson – HUB International</i> <i>Jeffrey Weaver – JP Morgan</i> <i>Joseph Edmonds – T. Rowe Price</i> <i>Todd Howard – MassMutual</i>
11:35 – 11:50	Break	Pick up your Lunch
11:50 – 1:15	Session 4 (Working Lunch)	What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plan? <u>Group Discussion Leaders:</u> <i>Carlos Lopez & Lindsay Zimmerman – Principal</i> <i>Mica Fisher – Fidelity Investments</i> <i>Perry Lazarus – Transamerica</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		