

Thursday, March 6, 2025

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

Location:

Quinnipiac University

School of Medicine, Nursing and

Health Sciences

Multipurpose Room

370 Bassett Rd.

North Haven, CT 06473

Adjunct Lecturer Presenting:

Michael Del Re III, ChFC®, REBC®, AIF®

Northeast Managing Partner, Prime Capital Financial

The Plan Sponsor University – Agenda

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

8:00 – 8:30	Breakfast / Registration	Registration & Sign-in
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 Empowering Futures: Retirement Committee Best Practices & Boosting Employee Financial Wellness <i>Michael Del Re III, ChFC®, REBC®, AIF® – Prime Capital Financial</i> <i>Jania Stout C(k)P® – Prime Capital Financial, Retirement and Wellness</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Michael Del Re III, ChFC®, REBC®, AIF® – Prime Capital Financial</i> <u>Panelists:</u> <i>Bob Hunt – Fidelity Investments</i> <i>Andy Laskowski – Capital Group / American Funds</i> <i>Michael Smoots J.D. – Prime Capital Financial</i> <i>Alan Valenca – T. Rowe Price</i>
10:50 – 11:35	Session 3	Keynote Presentation DC Trends...Elevate your DC Plan <i>John Doyle – Capital Group / American Funds</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>Paul Giovanniello – Calamos Funds; Bob Hunt – Fidelity Investments</i> <i>Andy Laskowski – Capital Group / American Funds; Keith Neal – MFS</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>		