

Tuesday, March 18th, 2025

8:30 a.m. to 2:30 p.m.

Location:

Virginia Tech – Arlington Campus

Executive Briefing Center

900 Glebe Road

Arlington, VA 22203

Second Floor, Ballston Room

Adjunct Lecturer Presenting:

Colin Clark, C(k)P®

Senior Vice President, Retirement

HUB Retirement and Wealth Management

Agenda

The Plan Sponsor University

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

8:30 – 9:00	Breakfast/ Registration	Registration & Sign-in
9:00 – 9:25	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
9:25 – 10:25	Session 1	The Next Level Fiduciary – What You Can Do as a Plan Sponsor to Help Your Employees Get Retirement Ready <i>Colin Clark, C(k)P® – HUB Retirement & Wealth Management</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation – Stop Playing Mind Games Help Improve Participant Outcomes with Behavioral Insights <i>Jonathan Young – American Funds / Capital Group</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Tom Leverone, C(k)P® – HUB Retirement & Wealth Management</i> <u>Panelists:</u> <i>Kellen Foley – FlexPath</i> <i>Glenn Godin – American Century</i> <i>Brian Lynch – Pentegra</i> <i>David Norris – T. Rowe Price</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	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>James Fallon – Morgan Stanley</i> <i>Matt Vanaman – PIMCO</i>
1:45 – 2:15	Session 5	The Ideal Plan - Interactive Discussion
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		