TPSU
THE PLAN SPONSOR UNIVERSITY

Tuesday, March 11th, 2025
8:00 a.m. to 2:00 p.m.
Location:
Villanova University
West Campus - Garey Hall
Spring Mill Rd & County Line Rd
Villanova, PA 19085
Room 10A

Adjunct Lecturer Presenting:
Derek Fiorenza, C(k)P®
Chief Compliance Officer
Summit Group Retirement Planners

Agenda - The Plan Sponsor University		
The C(k)PF / The Certified 401(k) Plan Fiduciary Designation		
8:00 – 8:30	**Breakfast / Registration**	**Registration & Sign-in –** *(Breakfast Sponsored By: Franklin Templeton)*
8:30 – 8:50	**Introduction**	**Introduction to The Plan Sponsor University** *Jenny Jenkins – The Plan Sponsor University*
8:50 – 9:50	**Session 1**	**Presentation by Adjunct Lecturer** **Fiduciary Review** *Derek Fiorenza, C(k)P® – Summit Group Retirement Advisors* *Michael Cook, J.D. – Groom Law Firm, P.C.*
9:50 – 10:05	**Break**	
10:05 – 10:50	**Session 2**	**Keynote Presentation** **How to Prevent and Correct the Most Common Errors through EPCRS** *Maria T. Hurd – Belfint Lyons Shuman*
10:50 – 11:35	**Session 3**	**Panel Discussion with Industry Professionals** <u>Moderator</u>: *Derek Fiorenza, C(k)P® –Summit Group Retirement Partners* <u>Panelists</u>: *Roy Bentzen – Fisher Investments* *Matt Leeper – Capital Group / American Funds* *Glenn Macdonald – New York Life* *Matthew May – Fidelity Investments* *Jimmy Polito, C(k)P® – Nuveen*
11:35 – 11:50	**Pick 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>: *Anthony (AJ) Fiorenza – Summit Group Retirement Planners; Nancy Gerstner – Franklin Templeton; Brendan Kinnarney - North Square Investments; Jordan McLain – T. Rowe Price; Justin Muni – JP Morgan*
1:15 – 1:45	**Session 5**	**The Ideal Plan -** *Interactive Discussion*
1:45 – 2:00	**Closing**	**The C(k)PF Designation and Closing Statements**
Agenda is Subject to Change		