

Thursday, June 5th, 2025
8:00 a.m. to 2:00 p.m

Location:
Stonehill College
Meehan Business School
124 Belmont Street
Easton, MA 02357
Room 103

Adjunct Lecturer Presenting:
Scott Tuxbury
Vice President | Retirement Plan Advisory
Cambridge Trust

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
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	Adjunct Lecturer Presenting Shaping Tomorrow: Strategic Insights for a Better Retirement Program <i>Scott Tuxbury – Cambridge Trust</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation <i>The Evolution of the Target Date Fund</i> <i>Brian Roberts – flexPATH Strategies</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Scott Tuxbury – Cambridge Trust</i> <u>Panelists:</u> <i>Michael Burke – Principal</i> <i>Paul Webb – flexPATH Strategies</i> <i>Jennifer Weikel – Benefit Plan Administrative Services, Inc.</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>Michael Burke – Principal</i> <i>Paul Webb – flexPATH Strategies</i> <i>Jennifer Weikel – Benefit Plan Administrative Services, Inc.</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		