

**Tuesday, May 13<sup>th</sup>, 2025**  
8:00 a.m. to 2:00 p.m

Location:  
**University of Denver**  
Community Commons  
CCOM Grand Forum (1700)  
2055 E Evans Ave  
**Denver, CO 80210**

Adjunct Lecturers Presenting:  
**Jania Stout**  
*President, Retirement & Wellness*  
**Sean Clancy**  
*Partner, Managing Director*  
**Prime Capital Financial**

<b>Agenda – The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	<b>Breakfast/Registration</b>	<b>Registration &amp; Sign-in</b>
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:55 – 9:55	<b>Session 1</b>	<b>Adjunct Lecturer Presenting</b> <b>The 10 Things You're Still Doing Wrong (or Not Doing Right) as a Plan Fiduciary</b> <i>Jania Stout – Prime Capital Financial</i>
9:55 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Helping Employees Navigate the Financial Vortex</b> <i>Chris Ceder – Goldman Sachs</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Matt Waters – Prime Capital Financial</i> <u>Panelists:</u> <i>John Tuite – Fidelity</i> <i>Brad Weber – The Standard</i> <i>Matt Wolniewicz – Income America</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch</b>
11:50 – 1:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Jim Allen – Principal; Ben Englehart – Voya; Dean Johnson – Charles Schwab; Samuel McGibbon – JP Morgan; Brian Simms – Lincoln Financial</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - <i>Interactive Discussion</i></b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		