

Thursday, May 15th, 2025
9:00 a.m. to 3:00 p.m.

Location:
University of San Diego
Joan B. Kroc School of Peace Studies
5555 Marian Way
San Diego, CA 92110
Conference Room KIPJ CD

Adjunct Lecturers Presenting:
Ryan Stover
Principal
Bill Peartree
Principal, Director
Marsh McLennan

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	Breakfast / Registration	Registration & Sign-in
9:30 – 9:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
9:55 – 10:55	Session 1	Keynote Presentation Elevating Your Defined Contribution Plan – Latest DC Plan Trends <i>Sue Walton – American Funds / Capital Group</i>
10:55 – 11:05	Break	
11:05 – 11:50	Session 2	Adjunct Lecturer Presenting The Role of the Advisor <i>Ryan Stover & Bill Peartree – Marsh McLennan</i>
11:50 – 12:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Ryan Stover – Marsh McLennan</i> <u>Panelists:</u> <i>Travis Campbell – Fidelity</i> <i>Matt Kasa – Nuveen</i> <i>Ken Krell – T. Rowe Price</i>
12:35 – 12:50	Break	Pick up your Lunch
12:50 – 2:15	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>Orlando Cuevas – Empower; Matt DeMarco – PIMCO; Dan Hemberger – Cohen and Steers; John Lessley – Dimensional; Taylor Pluss & Tony Nikaj – Janus Henderson</i>
2:15 – 2:45	Session 5	The Ideal Plan - Interactive Discussion
2:45 – 3:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		