

Wednesday, June 11th, 2025
8:00 a.m. to 2:00 p.m.

Location:

DeSales University
DeSales University Center
2755 Station Avenue
Center Valley, PA 18034
Commonwealth Room

Adjunct Lecturer Presenting:
Brendan Speers C(k)P®
Partner | Director of Retirement Plan Services
Legacy Planning

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
8:55 – 9:50	Session 1	Adjunct Lecturer Presenting Utilizing Your 401(k) Plan to Recruit, Retain & Reward <i>Brendan Speers, C(k)P® – Legacy Planning</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Understanding In-Plan Retirement Income <i>Matt Stubblefield – Allianz</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brendan Speers, C(k)P® – Legacy Planning</i> <i>Conni King – Legacy Planning</i> <i>Matt Leeper – American Funds</i> <i>Roman Leshak – Kreischer Miller</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>Pat Forde – Empower Retirement</i> <i>Conni King – Legacy Planning</i> <i>Matt Leeper – American Funds</i> <i>Brendan Speers, C(k)P® – Legacy Planning</i> <i>Matt Stubblefield – Allianz</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>		