

Thursday, August 14th, 2025

8:00 a.m. - 2:00 p.m.

Location:

Robert Morris University

UPMC Events Center

6001 University Blvd.

Moon Township, PA 15108

Hall 1&3

Adjunct Lecturer Presenting:

Chris DeAndrea, C(k)P®

Director of Retirement Plan Consulting

Webber Advisors

Agenda — The Plan Sponsor University

The C(k)PF / The Certified 401(k) Plan Fiduciary Designation

8:00 – 8:30	Breakfast/Sign-in	Sign-in Mandatory <i>Breakfast Sponsored by PGIM</i>
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 The Role of the Retirement Plan Advisor <i>Chris DeAndrea, C(k)P® – Webber Advisors</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Best Practices for Education Strategies <i>Chrissy DeCaria – Benefit Plans Administrative Services</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Evan Hirsh– Webber Advisors</i> <u>Panelists:</u> <i>John Doyle – Capital Group / American Funds</i> <i>Kellen Frye – PIMCO</i> <i>Kevin McDonough – Principal Financial Group</i> <i>Michael Spurduto – The Standard</i>
11:35 – 11:50	Break	Pick up your Lunch – Sponsored by J.P. Morgan
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>Damon Clayton & Marcus Persichetti – Federated Hermes</i> <i>Chris McAvoy – T. Rowe Price</i> <i>Michael Moschetta – Ascensus</i> <i>James Polito, C(k)P® – Nuveen</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		