

**Wednesday, August 20<sup>th</sup>, 2025**  
8:00 a.m. to 2:00 p.m.

Location:

**Florida Atlantic University**

Student Union Building

777 Glades Road

Boca Raton, FL 33431

Live Oak Pavilion – Rooms C & D

Adjunct Lecturer Presenting:

**Shir McGettigan, C(k)P®**

*Director, Employer-Sponsored Retirement Plans, Wealth Management Advisor*

**HUB Retirement and Wealth Management**

<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/Sign-in</b>	<b>Sponsored by Empower</b> <b>Sign-in Mandatory</b>
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> Fred Barstein, C(k)P® – <i>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>Shir McGettigan, C(k)P® – HUB Retirement and Wealth Management</i>
9:55 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Stop Playing Mind Games – Help Improve Participant Outcomes with Behavioral Insights</b> <i>John Doyle – Capital Group / American Funds</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Mitch Starr – HUB Retirement and Wealth Management</i> <u>Panelists:</u> <i>Hector Aguililla – Berkowitz Pollack Brant</i> <i>Andreas Duran - Paylocity</i> <i>Jim Gilligan – The Standard</i> <i>Alex Kahn – flexPATH Strategies</i> <i>Shir McGettigan – HUB Retirement and Wealth Management</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch – Sponsored by Alliance Bernstein</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>Mica Fisher – Fidelity Investments</i> <i>Carlos Lopez and Lindsey Zimmerman – Principal Financial Group</i> <i>Charles Sosa – Capital Group / American Funds</i> <i>Amy Thomas – Vanguard</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</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>		