

Tuesday, August 19th, 2025
8:00 a.m. to 2:00 p.m

Location:
North Carolina State University
NC State Park Alumni Center
2450 Alumni Drive
Raleigh, NC 27606
The Great Reception Room

Adjunct Lecturer Presenting:
J. Andy Ingram, AIF[®], QPFA[™], CPFA[®], Ri(k)[™]
Qualified Plan Fiduciary, Lifestyle Investment Advisor
Capital Investment Company of Virginia / Sollinda Capital Management

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast/Sign-in	Sponsored by Allianz Sign-in Mandatory
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P[®] – The Plan Sponsor University</i>
8:55 – 9:50	Session 1	Adjunct Lecturer Presenting <i>The Role of the Advisor</i> <i>J. Andy Ingram – Capital Investment Company of Virginia / Sollinda Capital Management</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Stop Playing Mind Games: Help Improve Participant Outcomes with Behavioral Insights <i>Jonathan Young – Capital Group / American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>J. Andy Ingram – Capital Investment Company of Virginia / Sollinda Capital Management</i> <u>Panelists:</u> <i>Hunter DeHart – Paylocity</i> <i>James Holland – Synchronomics</i> <i>Paul Villanueva – 401GO</i>
11:35 – 11:50	Break	Pick up your Lunch – Sponsored by Allianz
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>Jennifer Bryant – Pension Assurance LLP</i> <i>Mark Robinson & Joe Edmonds – T. Rowe Price</i> <i>Sarah Zaikowski – Vanguard</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>		