

**Tuesday, August 26<sup>th</sup>, 2025**

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

Location:

**Rice University**

Rice Memorial Center - Farnsworth Pavilion

6100 Main Street

Houston, TX 77005

Adjunct Lecturers Presenting:

**Jania Stout**

*President, Retirement & Wellness*

**Robert Massa**

*Managing Director*

**Prime Capital Financial**

**Agenda – The Plan Sponsor University**

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

8:00 – 8:30	<b>Breakfast/Sign-in</b>	<b>Sign-in Mandatory</b>
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:55 – 9:50	<b>Session 1</b>	<b>Adjunct Lecturers Presenting</b> <b>11 Things You Are Still Doing Wrong (or Not Doing Right) as a Fiduciary</b> <i>Jania Stout &amp; Robert Massa – Prime Capital Financial</i>
9:50 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Voice of the American Worker</b> <i>Andrew Brosco – Franklin Templeton</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals: Next Year's Ideas Today</b> <u>Moderator:</u> <i>Rich Eagar – Prime Capital Financial</i> <u>Panelists:</u> <i>Amanda Lewis – BlackRock</i> <i>Brian Munn, C(k)P® – American Century Investments</i> <i>Lauren Top – State Street Investment Management</i> <i>Andy Tyndall, C(k)P® – MFS Investment Management</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch</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>Val Ferrara – SEI Trust Company</i> <i>Chris Gasta – Cohen &amp; Steers</i> <i>Carey Lindsey – Empower</i> <i>Mark Pottle – Neuberger Berman</i> <i>Jay Slusher – PIMCO</i> <i>Erich M. Von Berekhy – Harbor Capital</i>
01:15 – 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>		