

Virtual TPSU Program
Wednesday, August 13th, 2025
8:30 a.m. - 12:00 p.m. EST

Adjunct Lecturer Presenting:
Shelly Horwitz, C(k)P®
Managing Director
World Investment Advisors

Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</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 – 9:35	Session 1	Adjunct Lecturer Presenting The Convergence of Healthcare & Retirement <i>Shelly Horwitz, C(k)P® – World Investment Advisors</i>
9:35 – 9:45	Break	
9:45 – 10:30	Session 2	Keynote Presentation Stop Playing Mind Games – Help Improve Participant Outcomes with Behavioral Insights <i>Jennifer Miller – Capital Group / American Funds</i>
10:30 – 11:15	Session 3	Retirement Income Solutions Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Shelly Horwitz, C(k)P® – World Investment Advisors</i> <u>Panelists:</u> <i>Sara Lowery – Nuveen</i> <i>Lauren Top – State Street Investment Management</i>
11:15 – 11:25	Break	
11:25 – 11:50	Session 4	The Ideal Plan – <i>Interactive Discussion</i>
11:50 – 12:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		