

Tuesday, September 23rd, 2025

9:00 a.m. to 3:15 p.m.

Location:

Fordham University School of Law

150 W 62nd St

New York, NY 10023

Bateman Room

Adjunct Lecturer Presenting:

Burak N. Alpaslan, CFP®, AIF®, C(k)P®, CPFA®

Co-Founder | Partner

Vital Planning Group

Agenda – The Plan Sponsor University

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

9:00 – 9:30	Breakfast / Sign-in	Sign-in Mandatory
9:30 – 9:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
9:55 – 10:10	Roll Call	<i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
10:10– 11:05	Session 1	Adjunct Lecturer Presenting What do Plan Participants Want? <i>Burak N. Alpaslan, C(k)P® – Vital Planning Group</i>
11:05 – 11:15	Break	
11:15 – 12:00	Session 2	Keynote Presentation Defined Contribution Trends in Qualified Plans <i>Sue Walton - Capital Group/American Funds</i>
12:00 – 12:45	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Burak N. Alpaslan, C(k)P® – Vital Planning Group</i> <u>Panelists:</u> <i>Molly McDonough – Fidelity Investments</i> <i>Jennifer Mulrooney – American Century Investments</i> <i>Alison Smith – Principal Financial Group</i>
12:45-12:55	Session 4	Convergence of Wealth & Retirement at the Workplace <i>Jerry Bonnabeau – Pontera</i>
12:55 – 1:05	Break	Pick up your Lunch
1:05 – 2:30	Session 5 (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>Jason Carlough – Capital Group/American Funds</i> <i>Mark Cywin – Transamerica Retirement Solutions</i> <i>James Hakewill - MFS Investment Management</i> <i>Robin Mellen – Paylocity</i>
2:30 – 3:00	Session 6	The Ideal Plan - <i>Interactive Discussion</i>
3:00 – 3:15	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		