

Tuesday, September 16th, 2025
8:00 a.m. to 2:00 p.m.

Location:
Marquette University
Alumni Memorial Union
1442 W. Wisconsin Avenue
Milwaukee, WI 53233
Room 157

Adjunct Lecturer Presenting:
Todd Barden, C(k)P®
Founding Partner
Great Lakes Retirement Plan Consultants

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	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 – 9:55	Session 1	Adjunct Lecturer Presenting The 10 Things You're Still Doing Wrong (or Not Doing Right) as a Plan Fiduciary <i>Todd Barden, C(k)P® – Great Lakes Retirement Plan Consultants</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation What is Your Retirement Plan? A Framework for Examining Retirement Income Solutions <i>Ned McNally – State Street Investment Management</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Todd Barden, C(k)P® – Great Lakes Retirement Plan Consultants</i> <u>Panelists:</u> <i>Jonathon Dues, C(k)P® – Fisher Investments</i> <i>Josh Gordon – Capital Group / American Funds</i> <i>Eric Milano – T. Rowe Price</i>
11:35 – 11:50	Break	Pick up your Lunch
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>Dave Bedrick – First Eagle Investments</i> <i>David Foley – The Standard</i> <i>Jim Lowery – Pacific Life</i> <i>Marta Rodriguez – J.P. Morgan Asset Management</i> <i>Luke Szafranski – Transamerica Retirement Solutions</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		