



Tuesday, October 28th, 2025
8:00 a.m. to 2:00 p.m

Location:

The University of Denver
Community Commons
CCOM Grand Forum (1700)
2055 E Evans Ave
Denver, CO 80210

Adjunct Lecturers Presenting:

Jania Stout

President, Retirement & Wellness

Sean Clancy

Partner, 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	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 – 9:50	Session 1	Adjunct Lecturer Presenting 10 Things You are Still Doing Wrong (or Not Doing Right) as a Fiduciary <i>Jania Stout – Prime Capital Financial</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Exploring Advancements in Cybersecurity and AI <i>Trish McGinity – Empower</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals Industry Innovations <i>Moderator: Matt Waters – Prime Capital Financial</i> <u>Panelists:</u> <i>Kathryn Farrell – T. Rowe Price</i> <i>Brad Weber – The Standard</i> <i>Jessica Wilson – Franklin Templeton</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>Jim Allen – Principal Financial Group</i> <i>Ben Englehart – Voya Financial</i> <i>Kevin Morgan – J.P. Morgan Asset Management</i> <i>John Tuite – Fidelity Investments</i> <i>Jessica Wilson – Franklin Templeton</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>		