



TPSU
THE PLAN SPONSOR
UNIVERSITY



Wednesday, October 22nd, 2025
8:00 a.m. - 2:15 p.m.

Location:
DeSales University
DeSales University Center
2755 Station Avenue
Center Valley, PA 18034
Commonwealth Room

Adjunct Lecturer Presenting:
Brendan Speers, C(k)P®
Partner | Director of Retirement Plan Services
Legacy Planning

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>Brendan Speers, C(k)P® – Legacy Planning</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>Brendan Speers, C(k)P® – Legacy Planning</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Elevate Your DC Plan <i>Sue Walton – Capital Group/American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brendan Speers, C(k)P® – Legacy Planning</i> <u>Panelists:</u> <i>Chris Hueth – Fidelity Investments</i> <i>Conni King – Legacy Planning Partners</i> <i>Matt Leeper – Capital Group/American Funds</i> <i>Roman Leshak Jr. – Kreischer Miller</i>
11:35 – 11:45	Session 4	Convergence of Wealth & Retirement at the Workplace <i>Jerry Bonnabeau – Pontera</i>
11:45 – 12:00	Break	Pick up your Lunch
12:00 – 1:25	Session 5 (Working Lunch)	What is Working in Today's 401(k) Plans? What is <i>Not</i> Working in Today's 401(k) Plan? <u>Group Discussion Leaders:</u>
1:25 – 1:55	Session 6	The Ideal Plan - <i>Interactive Discussion</i>
1:55 – 2:15	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		