

Thursday, October 30th, 2025
8:00 a.m. to 2:30 p.m

Location:
Phillips Academy
Andover Inn - Phillips Room
4 Chapel Ave
Andover, MA 01810

Adjunct Lecturer Presenting:
Steven Johnian
SFP Wealth

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 Required for Continuing Education Hours <i>Sponsored by Invesco</i>
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i> <i>Steven Johnian – SFP Wealth</i>
8:55 – 9:55	Session 1	Adjunct Lecturer Presenting The Value of Working with a Retirement Plan Advisor <i>Steven Johnian – SFP Wealth</i>
9:55 – 10:05	Session 2	Retirement Income for Better Participant Outcomes <i>Shane Dawe – Pacific Life</i>
10:05 – 10:15	Break	
10:15 – 11:00	Session 3	Keynote Presentation Trends in Defined Contribution Plans <i>Sue Walton – Capital Group/American Funds</i>
11:00 – 11:55	Session 4	Panel Discussion: What’s on the minds of HR Professionals <u>Moderator:</u> <i>Raymond Pedrick – SFP Wealth</i> <u>Panelists:</u> <i>Zeemel Croft – Paylocity</i> <i>Mike Cully – Brown & Brown Insurance</i> <i>Gwyneth Donahue – Baystate Financial</i> <i>Mickie Morley & Rena Somersan – Ascensus</i>
11:55 – 12:10	Break	Lunch Will Be Provided
12:10 – 1:35	Session 5 (Working Lunch)	401(k) Realities in 2025 and Beyond: What’s Working—and What Isn’t—in the 401(k) Space, Benefits, and Talent Strategy. <u>Peer-to-Peer Discussion Facilitated by Industry Leaders</u> <i>Catherine Freeman & Dan McDonnell – SFP Wealth</i> <i>John Uricchio, C(k)P® – Janus Henderson Investors</i> <i>Paul Webb – flexPATH Strategies</i>
1:35 – 2:05	Session 6	The Ideal Plan - <i>Interactive Discussion</i>
2:05 – 2:25	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		