



Thursday, October 9th, 2025

8:00 a.m. to 2:15 p.m.

Location:

Quinnipiac University

School of Medicine, Nursing and Health Sciences 370 Bassett Rd.

North Haven, CT 06473

Multipurpose Room

Adjunct Lecturer Presenting: Michael Del Re III, ChFC®, REBC®, AIF®

Northeast Managing Partner, 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 Fred Barstein, C(k/P* – The Plan Sponsor University Adjunct Lecturer Presenting Empowering Futures: Retirement Committee Best Practices & Boosting Employee Financial Wellness Michael Del Re III, ChFC*, REBC*, AIF* – Prime Capital Financial Jania Stout, C(k/P* – Prime Copital Financial, Retirement and Wellness 10:10 – 10:20 Break Keynote Presentation Elevating Your Defined Contribution Plan – Latest DC Plan Trends Sue Walton – Capital Group/American Funds Alan Valença – T. Rowe Price 11:05 – 11:05 Session 3 Panel Discussion with Industry Professionals Moderator: Michael Del Re III, ChFC*, REBC*, AIF* – Prime Capital Financial Panelists: Robert Hunt – Fidelity Investments Andrew Laskowski – Capital Group/American Funds Alan Valença – T. Rowe Price 11:05 – 12:05 Session 4 Convergence of Wealth & Retirement at the Workplace Jerry Bonnabeau & Oladele Gaba – Pontera 12:05 – 12:15 Break Pick up your Lunch What is Working in Today's 401(k) Plans? What is Working in Today's 401(k) Plan? Group Discussion Leaders: Robert Hunt – Fidelity Investments; Andrew Laskowski – Capital Group/American Funds Alan Valença – T. Rowe Price Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC; Robert Edgar	Trontineast managing rather, i time Supital i maneial		
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### Adjunct Lecturer Presenting Empowering Futures: Retirement Committee Best Practices & Boosting Empowering Futures: Retirement Committee Best Practices & Boosting Empoyee Financial Wellness Michael Del Re III, ChFC®, REBC®, AlF® – Prime Capital Financial Jania Stout, C(k)P® – Prime Capital Financial, Retirement and Wellness Michael Del Re III, ChFC®, REBC®, AlF® – Prime Capital Financial Jania Stout, C(k)P® – Prime Capital Financial, Retirement and Wellness Reynote Presentation	8:00 – 8:30	Breakfast/Sign-in	Sign-in Mandatory
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