

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 <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:55 – 10:10	Session 1	Adjunct Lecturer Presenting Empowering Futures: Retirement Committee Best Practices & Boosting Employee Financial Wellness <i>Michael Del Re III, ChFC®, REBC®, AIF® – Prime Capital Financial</i> <i>Janina Stout, C(k)P® – Prime Capital Financial, Retirement and Wellness</i>
10:10 – 10:20	Break	
10:20 – 11:05	Session 2	Keynote Presentation Elevating Your Defined Contribution Plan – Latest DC Plan Trends <i>Sue Walton – Capital Group/American Funds</i>
11:05 – 11:55	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Michael Del Re III, ChFC®, REBC®, AIF® – Prime Capital Financial</i> <u>Panelists:</u> <i>Robert Hunt – Fidelity Investments</i> <i>Andrew Laskowski – Capital Group/American Funds</i> <i>Alan Valença – T. Rowe Price</i>
11:55 – 12:05	Session 4	Convergence of Wealth & Retirement at the Workplace <i>Jerry Bonnabeau & Oladele Gaba – Pontera</i>
12:05 – 12:15	Break	Pick up your Lunch
12:15 – 1:35	Session 5 (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>Robert Edgar – The Standard; Paul Giovanniello – Calamos Investments LLC;</i> <i>Robert Hunt – Fidelity Investments; Andrew Laskowski – Capital Group/American Funds; Keith Neal, C(k)P® – MFS Investment Management;</i> <i>Alan Valença – T. Rowe Price</i>
1:35 – 2:05	Session 6	The Ideal Plan - Interactive Discussion
2:05 – 2:15	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		