



**Thursday, October 23<sup>rd</sup>, 2025**  
9:00 a.m. to 3:00 p.m.

Location:

**The University of California**  
Walter A Buehler Alumni Center  
530 Alumni Ln.  
**Davis, CA 95819**  
Alpha Gamma Rho Hall

Adjunct Lecturer Presenting:

**Sheldon Nix, C(k)P®**

*Co-Founder | CEO*

**Exceed Wealth & Retirement Group, Inc.**

<b>Agenda – The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	<b>Breakfast / Sign-in</b>	<b>Sign-in Mandatory</b>
9:30 – 9:50	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
9:50 – 10:50	<b>Session 1</b>	<b>Adjunct Lecturer Presenting</b> <b>The Advisor Advantage: Elevating Retirement Plan Success</b> <i>Sheldon Nix, C(k)P® – Exceed Wealth &amp; Retirement Group, Inc.</i>
10:50 – 11:05	<b>Break</b>	
11:05 – 11:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Your Plan Needs an Audit...Now What? What Plan Sponsors Need to Know</b> <i>Bradley J. Bartells, CPA – MUN CPAs</i>
11:50 – 12:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Sheldon Nix, C(k)P® – Exceed Wealth &amp; Retirement Group, Inc.</i> <u>Panelists:</u> <i>Murray A. Cleaner, C(k)P® – Morningstar, Inc.</i> <i>Richard Merson – PIMCO</i> <i>Maria Rayas McPhee – Empower</i> <i>Tina M. White, C(k)P® – Franklin Templeton Investments</i>
12:35 – 12:50	<b>Break</b>	<b>Pick up your Lunch</b>
12:50 – 2:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today's 401(k) Plans?</b> <b>What is Not Working in Today's 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Zachary Carstensen – John Hancock</i> <i>Henry Giano – T. Rowe Price</i> <i>Mark Herzhauser - MetLife</i> <i>Marc Ialeggio – Capital Group/American Funds</i>
2:15 – 2:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
2:45 – 3:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		