

Wednesday, November 19th, 2025
8:00 a.m. to 2:00 p.m.

Location:

University of South Florida
Marshall Student Center, Room 2709
4202 E. Fowler Ave
Tampa, FL 33620

Adjunct Lecturer Presenting:
Brent Sheppard
Partner | Financial Advisor
Cadence Financial Management

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
8:55 – 9:50	Session 1	Adjunct Lecturer Presenting 10 Things You're Still Doing Wrong (or Not Doing Right) as a Plan Fiduciary <i>Brent Sheppard – Cadence Financial Management</i>
9:50 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Visualize Retirement <i>Patrick Delaney – T. Rowe Price</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Brent Sheppard – Cadence Financial Management</i> <u>Panelists:</u> <i>Gregory Libby – Fidelity Investments</i> <i>Matthew Stubblefield – Allianz Life</i> <i>Lauren Top – State Street Investment Management</i> <i>Paul Villanueva – 401GO</i>
11:35 – 11:50	Break	Pick up your Lunch
11:50 – 1:15	Session 4 (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> <i>Jared Hyman – The Standard; Kevin Johnston - Goldman Sachs; Sara Lowery – Nuveen; Noah Guerrero – PIMCO; Annmarie Woods – Guggenheim Investments</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		