



Thursday, October 9th, 2025

8:30 a.m. to 2:30 p.m.

Location:

Virginia Tech – Arlington Campus

Executive Briefing Center

900 Glebe Road

Arlington, VA 22203

Second Floor, Ballston Room

Adjunct Lecturer Presenting:

Thomas R. Leverone, C(k)P®

Senior Vice President

HUB International

Agenda – The Plan Sponsor University

The C(k)PF / The Certified 401(k) Plan Fiduciary Designation

8:30 – 9:00	Breakfast / Sign-in	Sign-in Mandatory
9:00 – 9:20	Introduction	Introduction to The Plan Sponsor University <i>Thomas R. Leverone, C(k)P® – HUB International</i>
9:20 – 10:20	Session 1	Adjunct Lecturer Presenting The Next Level Fiduciary – What You Can Do as a Plan Sponsor to Help Your Employees Get Retirement Ready <i>Thomas R. Leverone, C(k)P® – HUB International</i>
10:20 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation The 2025 Read on Retirement Report <i>Stacey Tovrov – BlackRock</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Colin Clark, C(k)P® – HUB International</i> <u>Panelists:</u> <i>Jeyalene Baron – HUB International</i> <i>Scott Davis – Transamerica</i> <i>Yolanda DeGrange – John Hancock</i> <i>Dan Jess – Capital Group American Funds</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	Session 4 (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>Shaun Bromley – J.P. Morgan Asset Management</i> <i>Jim Dowling, C(k)P® – Fidelity Investments</i> <i>Mark Drake – New York Life Investments</i> <i>David Frost – Lincoln Financial</i> <i>Jimmy Polito, C(k)P® – Nuveen</i> <i>Matt Vanaman – PIMCO</i>
1:45 – 2:15	Session 5	The Ideal Plan - Interactive Discussion
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
Agenda is Subject to Change		