

Thursday, November 6th, 2025
8:00 a.m. to 2:00 p.m.

Location:
Villanova University
West Campus - Garey Hall
Spring Mill Rd & County Line Rd
Villanova, PA 19085
Room 10A

Adjunct Lecturer Presenting:
Derek Fiorenza, C(k)P®
Chief Compliance Officer
Summit Group Retirement Planners, Inc.

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 Required for Continuing Education Hours
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:55 – 9:55	Session 1	Adjunct Lecturer Presenting 10 Things You are Still Doing Wrong (or Not Doing Right) as a Fiduciary <i>Derek Fiorenza, C(k)P® – Summit Group Retirement Planners, Inc.</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation How to Elevate Your DC Plan — DC Plan Trends <i>Sue Walton – Capital Group/American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Derek Fiorenza, C(k)P® – Summit Group Retirement Planners, Inc.</i> <u>Panelists:</u> <i>William Davis – AllianceBernstein</i> <i>James Hakewill – MFS Investment Management</i> <i>Jordan McLain – T. Rowe Price</i> <i>Michael Shamon – The Standard</i>
11:35 – 11:50	Break	Pick up your Lunch <i>Sponsored by BlackRock</i>
11:50 – 1:15	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>Christopher Hueth – Fidelity Investments</i> <i>Maria Hurd – Belfint, Lyons & Shuman, P.A.</i> <i>Derrick Stancick – Federated Hermes</i> <i>Gregg Torti – Catalyst Funds</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		