

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> | | |
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| 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>Brent Sheppard – Cadence Financial Management</i> |
| 8:55 – 9:55 | 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> |
| 9:55 – 10:05 | Break | |
| 10:05 – 10:50 | Session 2 | Keynote Presentation Visualize Retirement <i>Jason Butler – T. Rowe Price</i> |
| 10:50 – 11:35 | Session 3 | Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Joseph Mendell – 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 Not Working in Today’s 401(k) Plan? <u>Group Discussion Leaders:</u> <i>Noah Guerrero – PIMCO</i> <i>Jared Hyman – The Standard</i> <i>Kevin Johnston - Goldman Sachs</i> <i>Sara Lowery – Nuveen</i> <i>Daniel Miles – Franklin Templeton</i> <i>Joe Tabella – Principal Financial Group</i> <i>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> | | |