

Thursday, February 19th, 2026
8:00 a.m. - 2:00 p.m.

Location:
Columbus State Community College
Workforce Development Building
315 Cleveland Avenue, 4th Floor
Columbus, Ohio 43215
Room #414 AB

Adjunct Lecturer Presenting:
Deena M. Rini, MBA, C(k)P®
Senior Vice President, Managing Director
Oswald Financial, 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 Health & Wealth Benefits: Excellence in Fiduciary Stewardship <i>Deena M. Rini, MBA, C(k)P® – Oswald Financial, Inc.</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Latest Trends in DC Plans <i>Sue Walton – Capital Group/American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Tyler Deck – Oswald Financial, Inc.</i> <u>Panelists:</u> <i>Jeffrey Baumgartner – Empower</i> <i>Aaron Hassinger, C(k)P® – PIMCO</i> <i>Hannah Ritchie – Morningstar, Inc.</i> <i>Tim White – T. Rowe Price</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) Plans? <u>Group Discussion Leaders:</u> <i>Mark Christensen – The Standard; Rob Kerscher – The Standard; Ned McNally – State Street Investment Management; Dave Sargent – BlackRock; Steven Silverman, C(k)P® – American Century Investments; Andrew Spahr – Fidelity Investments; Jamie Spenthoff – J.P. Morgan Asset Management; Douglas Stalter - Oswald Financial, Inc.</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