

Wednesday, March 4th, 2026

8:00 a.m. - 2:00 p.m.

Location:

Robert Morris University

UPMC Events Center

6001 University Blvd

Moon Township, PA 15108

Hall 1&3

Adjunct Lecturer Presenting:

William B. Beale

President

Beale Financial Group

Agenda – The Plan Sponsor University

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

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 (and Not Doing Right) as a Fiduciary <i>William B. Beale – Beale Financial Group</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Retirement, by Design <i>Marc Howell – Principal Financial Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <i>Moderator: Adjunct Lecturer, William B. Beale</i> <u>Panelists:</u> <i>Brett Hall – American Century Investments</i> <i>Kevin McDonough - Principal Financial Group</i> <i>Christina Wilson – Voya Financial</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>Michael Moschetta – T. Rowe Price</i> <i>Joe Vandetti – Transamerica Retirement Solutions</i> <i>Christina Wilson & Jonathan Savona – Voya Financial, Inc.</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