

**TPSU**THE PLAN SPONSOR
UNIVERSITY**Wednesday, February 25th, 2026**

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

Location:**NOVA Southeastern University**

Alvin Sherman Library

3100 Ray Ferrero Jr. Blvd

Fort Lauderdale, FL 33314

2nd Floor, The Gallery Room

Adjunct Lecturer Presenting:

Shir McGettigan, C(k)P®*Director, Employer-Sponsored Retirement Plans, Wealth Management Advisor
HUB International***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 <i>Sponsored by Voya Financial</i>
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 <i>Shir McGettigan, C(k)P® – HUB International</i>
9:55 – 10:05	Break	<i>Sponsored by Nationwide Financial</i>
10:05 – 10:50	Session 2	Keynote Presentation Fiduciary Fundamentals <i>Jonathan Young – Capital Group/American Funds</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Mitch Starr – HUB International</i> <u>Panelists:</u> <i>Shir McGettigan, C(k)P® – HUB International</i> <i>Jeffrey A. Weaver – J.P. Morgan Asset Management</i> <i>MJ Zayac – AllianceBernstein</i>
11:35 – 11:50	Break	Pick up your Lunch – Sponsored by Goldman Sachs
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>Jason Butler – T. Rowe Price</i> <i>Perry Lazarus – Transamerica</i> <i>Carlos Lopez – Principal Financial Group</i> <i>Danielle Sauter – Fidelity Investments</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