

Thursday, February 26th, 2026
8:00 a.m. - 2:00 p.m.

Location:

Rice University
Rice Memorial Center
6100 Main Street
Houston, TX 77005
Farnsworth Pavilion

Adjunct Lecturers Presenting:
Jania Stout
President, Retirement & Wellness
Robert Massa
Managing Director
Prime Capital Financial

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 Lecturers Presenting From Courtroom to Committee Room: 5 ERISA Cases Every Fiduciary Must Know <i>Jania Stout & Robert Massa – Prime Capital Financial</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation The 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>Rich Eagar – Prime Capital Financial</i> <u>Panelists:</u> <i>Andrew Brosco – Franklin Templeton</i> <i>Katelyn Boone, C(k)P® – Fidelity Investments</i> <i>Kevin Morgan – J.P. Morgan Asset Management</i> <i>Shannon Knapp & Scott Messmer – John Hancock</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>Jennifer Brockwell – Janus Henderson Investors; Brett Burkhalter – Voya Investment Management; Dean Johnson – Charles Schwab</i> <i>Malcolm Lunn – Virtus Investment Partners; Mark Pottle – Neuberger Berman; Dan Sehn – Vanguard; Vincent Vermette – Invesco</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