

**Wednesday, March 4<sup>th</sup>, 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**

| <b>Agenda – The Plan Sponsor University</b><br><i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> |                                      |                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8:00 – 8:30                                                                                                        | <b>Breakfast/Sign-in</b>             | <b>Sign-in Required for Continuing Education Hours</b>                                                                                                                                                                                                                                                                      |
| 8:30 – 8:55                                                                                                        | <b>Introduction</b>                  | <b>Introduction to The Plan Sponsor University</b><br><i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>                                                                                                                                                                                                            |
| 8:55 – 9:55                                                                                                        | <b>Session 1</b>                     | <b>Adjunct Lecturer Presenting</b><br><b>10 Things You are Still Doing Wrong (and Not Doing Right) as a Fiduciary</b><br><i>William B. Beale – Beale Financial Group</i>                                                                                                                                                    |
| 9:55 – 10:05                                                                                                       | <b>Break</b>                         |                                                                                                                                                                                                                                                                                                                             |
| 10:05 – 10:50                                                                                                      | <b>Session 2</b>                     | <b>Keynote Presentation</b><br><b>Retirement, by Design</b><br><i>Marc Howell – Principal Financial Group</i>                                                                                                                                                                                                               |
| 10:50 – 11:35                                                                                                      | <b>Session 3</b>                     | <b>Panel Discussion with Industry Professionals</b><br><i>Moderator: Adjunct Lecturer, William B. Beale</i><br><u>Panelists:</u><br><i>Brett Hall – American Century Investments</i><br><i>Kevin McDonough - Principal Financial Group</i><br><i>Joe Pewdo – Hartford Funds</i><br><i>Christina Wilson – Voya Financial</i> |
| 11:35 – 11:50                                                                                                      | <b>Break</b>                         | <b>Pick up your Lunch</b>                                                                                                                                                                                                                                                                                                   |
| 11:50 – 1:15                                                                                                       | <b>Session 4<br/>(Working Lunch)</b> | <b>What is Working in Today’s 401(k) Plans?</b><br><b>What is Not Working in Today’s 401(k) Plans?</b><br><u>Group Discussion Leaders:</u><br><i>Brendon Costa – Beale Financial Group</i><br><i>Michael Moschetta – T. Rowe Price</i><br><i>Christina Wilson – Voya Financial</i>                                          |
| 1:15 – 1:45                                                                                                        | <b>Session 5</b>                     | <b>The Ideal Plan - <i>Interactive Discussion</i></b>                                                                                                                                                                                                                                                                       |
| 1:45 – 2:00                                                                                                        | <b>Closing</b>                       | <b>The C(k)PF Designation and Closing Statements</b>                                                                                                                                                                                                                                                                        |