

Tuesday, March 17th, 2026

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

Location:

Penn State Great Valley

Main Building

30 E. Swedesford Road

Malvern, PA 19355

Room 130/131

Adjunct Lecturer Presenting:

Derek Fiorenza, C(k)P®

Chief Operating Officer | Chief Commercial Officer

Summit Group Retirement Planners, 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 <i>Sponsored by Belfint, Lyons & Shuman, P.A.</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 The Role of the Retirement Plan Advisor <i>Derek Fiorenza, C(k)P® – Summit Group Retirement Planners, Inc</i>
9:55 – 10:05	Break	
10:05 – 10:30	Session 2	Keynote Presentation Student Loans: A National Crisis <i>Lindsay Vail Clark – Savi</i>
10:30 – 10:50	Session 2a	Keynote Presentation 2026 Market Update <i>James Dowling, C(k)P® – Fidelity Investments</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Derek Fiorenza, C(k)P®</i> <u>Panelists:</u> <i>Maria Hurd – Belfint Lyons & Shuman, P.A.</i> <i>Jordan McClain – T. Rowe Price</i> <i>Robert C. Mountain – New York Life Insurance Company</i>
11:35 – 11:50	Break	Pick up your Lunch – Sponsored by T. Rowe Price
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>Walter Abruzzese – Dimensional Fund Advisors; Christopher Hueth – Fidelity Investments; Maria Hurd – Belfint Lyons & Shuman, P.A.; Mike Nanz – The Standard; Brendan Kinnarney – North Square Investments; Joe Tabella – Principal Financial Group</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