

Tuesday, March 10th, 2026
8:00 a.m. - 2:00 p.m.

Location:
Wake Forest University
Charlotte Center
200 N College St. #150
Charlotte, NC 28202
Classroom 124

Adjunct Lecturer Presenting:
J. Andy Ingram, AIF[®], QPFA[™], CPFA[®], Ri(k)[™]
Qualified Plan Fiduciary, Lifestyle Investment Advisor
Capital Investment Company of Virginia | Sollinda Capital Management

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	Keynote Presentation Fiduciary Fundamentals - Demystifying Your Obligations to Retirement Plan Participants <i>John Doyle – Capital Group American Funds</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Adjunct Lecturer Presenting What Participants & Plan Sponsors Should Expect - A Specialist Advisors Role <i>J. Andy Ingram – Capital Investment Company of Virginia Sollinda Capital Management</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, J. Andy Ingram</i> <u>Panelists:</u> <i>Chad Azara – AssetMark</i> <i>James Holland – Synchronomics</i> <i>Steve Long – Fidelity Investments</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>Chad Azara – AssetMark</i> <i>James Holland – Synchronomics</i> <i>Steve Long – Fidelity Investments</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