

Thursday, April 23rd, 2026
8:00 a.m. - 2:00 p.m.

Location:

Bellevue College
U Building (Student Success Center)
3000 Landerholm Circle SE
Bellevue, WA 98007
Rooms U312/U313

Adjunct Lecturer Presenting:
Rich Hultquist
Retirement Plan Consultant
SCS

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 Lecturer Presenting The Role of The Retirement Plan Advisor <i>Rich Hultquist – SCS</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Exploring Advancements in Cybersecurity and AI <i>Trish McGinity – Empower</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Rich Hultquist</i> <u>Panelists:</u> <i>Deena Bell – Principal Financial Group</i> <i>Rachael Brumund – T. Rowe Price</i> <i>Sam Dart – Hunnex & Shoemaker, Inc.</i> <i>Kevin Hutton – Empower</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>Megan Branham – Principal Financial Group; Travis Fossati & Tony Soble – The Standard; Mike Foy – Reliance Trust Company an FIS Company; Brenna Gould – Manulife John Hancock Retirement; Owen Kiernan – MFS Investment Management; Shane Morales – T. Rowe Price</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

Agenda is Subject to Change