

Wednesday, April 29th, 2026
8:30 a.m. - 2:30 p.m.

Location:
Thunderbird School of Global Management
Arizona State University
401 N 1st Street
Phoenix, AZ 85004
Global Forum Room

Adjunct Lecturer Presenting:
Nicole Corning
Managing Partner
Pathlight Advisors

| Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> | | |
|--|--------------------------------------|---|
| 8:30 – 9:00 | Breakfast/Sign-in | Sign-in Required for Continuing Education Hours |
| 9:00 – 9:25 | Introduction | Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i> |
| 9:25 – 10:25 | Session 1 | Adjunct Lecturer Presenting What’s Top of Mind for Plan Sponsors <i>Nicole Corning – Pathlight Advisors</i> |
| 10:25 – 10:35 | Break | |
| 10:35 – 11:20 | Session 2 | Keynote Presentation Longevity – Rewriting the Retirement Roadmap <i>Ideas and Insight to Reshape Your Participant Education</i> <i>Adam Johnson – John Hancock</i> |
| 11:20 – 12:05 | Session 3 | Panel Discussion with Industry Professionals Hot Topics for Retirement Plans <i>Moderator: Adjunct Lecturer, Nicole Corning</i> <u>Panelists:</u> <i>Angela DeRubertis – Franklin Templeton</i> <i>Jason Graeb, C(k)P® – J.P. Morgan Asset Management</i> <i>Matt Kasa – Nuveen</i> <i>Ben Miller – Capital Group American Funds</i> |
| 12:05 – 12:20 | Break | Pick up your Lunch |
| 12:20 – 1:45 | 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: Host, Adam Johnson</u> <i>Shawn Cesare – ADP; Jason Graeb, C(k)P® – J.P. Morgan Asset Management;</i> <i>Brooks Lau – Principal Financial Group; Ashley Pizer – The Standard; Ben</i> <i>Miller – Capital Group American Funds; Randy Vail – Vestwell</i> |
| 1:45 – 2:15 | Session 5 | The Ideal Plan - <i>Interactive Discussion</i> |
| 2:15 – 2:30 | Closing | The C(k)PF Designation and Closing Statements |

Agenda is Subject to Change