

**Tuesday, June 2<sup>nd</sup>, 2026**  
9:00 a.m. – 3:15 p.m.

**Oregon State University - Portland Center**  
The Meier & Frank Building  
555 SW Morrison Street, Suite 200  
**Portland, OR 97204**  
Pioneer Room

Adjunct Lecturer Presenting:  
**Patrick Tschetter**  
*Retirement Plan Consultant*  
**Marsh McLennan Agency**

<b>Agenda – The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	<b>Breakfast/Sign-in</b>	<b>Sign-in Required for Continuing Education Hours</b>
9:30 – 9:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:55 – 10:55	<b>Session 1</b>	<b>Adjunct Lecturer Presenting</b> <b>10 Things You Are Still Doing Wrong (or Not Doing Right) as a Fiduciary</b> <i>Patrick Tschetter – Marsh McLennan Agency</i>
10:55 – 11:05	<b>Break</b>	
11:05 – 11:35	<b>Session 2</b>	<b>Keynote Presentation</b> <i>Brad Campbell – Faegre Drinker Biddle &amp; Reath LLP</i>
11:35 – 12:15	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Adjunct Lecturer, Patrick Tschetter</i> <u>Panelists:</u> <i>Derrick J. Amey – Manulife John Hancock Investments</i> <i>Brody Geist – The Standard</i> <i>Justin Matthews – Aprio Advisory Group, LLC</i> <i>Sam McGibbon – J.P. Morgan Asset Management</i>
12:15 – 12:25	<b>Break</b>	
12:25 – 1:05	<b>Session 3A</b>	<b>Confluence of Retirement and Benefits Panel</b> <u>Moderator:</u> <i>Patrick Sullivan, Marsh McLennan Agency</i> <u>Panelists:</u> <i>Jacob Colmenero – Marsh McLennan Agency</i> <i>Violeta Rios – SmithRx</i>
1:05 – 1:20	<b>Break</b>	<b>Pick up your Lunch</b>
1:20 – 2:40	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today’s Retirement Plans?</b> <b>What is <i>Not</i> Working in Today’s Retirement Plans?</b> <u>Group Discussion Leaders:</u>
2:40 – 3:05	<b>Session 5</b>	<b>The Ideal Plan - <i>Interactive Discussion</i></b>
3:05 – 3:15	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>

*Agenda is Subject to Change*