

Virtual TPSU Program
Thursday, April 16th, 2026
8:30 a.m. - 12:15 p.m. EST

Adjunct Lecturer Presenting:
Shelly Horwitz
Managing Director
World Investment Advisors

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 8:45	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:45 – 9:30	Session 1	Adjunct Lecturer Presenting Convergence of Retirement, Health, and Wealth <i>Shelly Horwitz – World Investment Advisors</i>
9:30 – 10:15	Session 2	Keynote Presentation Washington Update <i>Jillian Enoch – Fidelity Investments</i>
10:15 – 10:25	Break	
10:25 – 11:00	Session 3	Navigating the Next Era of 401(k) Plans: Structure, Strategy, and Stewardship <i>Moderator: James Vanke – World Investment Advisors</i> <u>Panelists:</u> <i>Jason Butler - T. Rowe Price</i> <i>Matt Cain – Empower Financial Services, Inc.</i> <i>Dale Korman – Harbor Capital Advisors, Inc.</i> <i>Tim Reuling – Allspring Global Investments</i>
11:00 – 11:30	Session 4	Breakout Sessions <i>Brian Munn, C(k)P® – American Century Investments</i> <i>Miller Peer – Empower Financial Services, Inc.</i> <i>Ray Rodriguez – Fidelity Investments</i> <i>Amy Thomas – Vanguard</i> <i>Lauren Top – State Street Investment Management</i>
11:30– 11:40	Session 4a	Recaps by Facilitators <i>Brian Munn, C(k)P® – American Century Investments</i> <i>Miller Peer – Empower Financial Services, Inc.</i> <i>Ray Rodriguez – Fidelity Investments</i> <i>Amy Thomas – Vanguard</i> <i>Lauren Top – State Street Investment Management</i>
11:40 – 12:15	Closing	The Ideal Plan, The C(k)PF Designation, and Closing Statements

Agenda is Subject to Change