

Thursday, May 14th, 2026
8:30 a.m. - 2:30 p.m.

Location:
Virginia Tech – Arlington Campus
Executive Briefing Center
900 Glebe Road
Arlington, VA 22203
Ballston Room

Adjunct Lecturer Presenting:
Thomas R. Leverone, C(k)P®
Senior Vice President
Hub International

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>Thomas R. Leverone, C(k)P® – HUB International</i>
9:25 – 10:25	Session 1	Adjunct Lecturer Presenting The Evolving Role of a Plan Fiduciary: How to Design Your Plan to Improve Outcomes <i>Thomas R. Leverone, C(k)P® – HUB International</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation What Are the Latest Trends in DC Plans? <i>John Doyle – Capital Group</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <i>Moderator: Colin Clark, C(k)P® – HUB International</i> <i>Panelists:</i> <i>Scott Davis – Transamerica</i> <i>Yolanda DeGrange – John Hancock</i> <i>Rachel Sims – HUB International</i> <i>John Uricchio, iC(k)P® – Janus Henderson Investors</i>
12:05 – 12:20	Break	Lunch Sponsored By PIMCO
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? <i>Group Discussion Leaders:</i> <i>Colin Clark, C(k)P® – HUB International; Hannah Rouse – T. Rowe Price;</i> <i>James Polito, C(k)P® – Nuveen; Dave Sargent – BlackRock; Matt Vanaman – PIMCO</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
<i>Agenda is Subject to Change</i>		