

**Wednesday, May 13<sup>th</sup>, 2026**

9:00 a.m. - 3:15 p.m.

**Broadridge**  
605 Third Avenue  
**New York, NY 10158**  
Conference Room: The Hub  
41st Floor

Adjunct Lecturer Presenting:  
**Brett S. Mcilveen**  
*Senior Sales Executive, Retirement Services*  
**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>Brett S. Mcilveen – Marsh McLennan Agency</i>
10:55 – 11:05	<b>Break</b>	
11:05 – 11:35	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Retirement Perspectives - A 360-Degree View of the DC Landscape</b> <i>Brandon Shea – T. Rowe Price</i>
11:35 – 12:15	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <i>Moderator: Adjunct Lecturer, Brett S. Mcilveen</i> <u>Panelists:</u> <i>Mike Andrulis – Franklin Templeton</i> <i>Rick Cortellessa – Goldman Sachs Asset Management</i> <i>Kristin Meader – Ascensus</i>
12:15 – 12:25	<b>Break</b>	
12:25 – 1:05	<b>Session 3a</b>	<b>Confluence of Retirement and Benefits Panel</b> <i>Moderator: Patrick Zerpa – Marsh McLennan Agency</i> <u>Panelists:</u> <i>Samantha DiMercurio – Marsh McLennan Agency</i> <i>Danielle O’Neill – ParetoHealth</i> <i>Alan P. Valenca – T. Rowe Price</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 Not Working in Today’s Retirement Plans?</b> <u>Group Discussion Leaders:</u> <i>Mike Andrulis – Franklin Templeton</i> <i>Rick Cortellessa – Goldman Sachs Asset Management</i> <i>Samantha DiMercurio &amp; Patrick Zerpa – Marsh McLennan Agency</i> <i>Kristin Meader – Ascensus</i> <i>Alan P. Valenca – T. Rowe Price</i>
2:40 – 3:05	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
3:05 – 3:15	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		