

Tuesday, June 2nd, 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

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	Breakfast/Sign-in	Sign-in Required for Continuing Education Hours
9:30 – 9:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
9:55 – 10:55	Session 1	Adjunct Lecturer Presenting 10 Things You Are Still Doing Wrong (or Not Doing Right) as a Fiduciary <i>Patrick Tschetter – Marsh McLennan Agency</i>
10:55 – 11:05	Break	
11:05 – 11:35	Session 2	Keynote Presentation Regulation, Litigation, Legislation: What You Need to Know About What’s Going On <i>Brad Campbell – Faegre Drinker Biddle & Reath LLP</i>
11:35 – 12:15	Session 3	Confluence of Retirement and Benefits Panel <i>Moderator: Adjunct Lecturer, Patrick Tschetter</i> <u>Panelists:</u> <i>Jacob Colmenero – Marsh McLennan Agency</i> <i>Violeta Rios – SmithRx</i> <i>Patrick Sullivan – Marsh McLennan Agency</i>
12:15 – 12:25	Break	
12:25 – 1:05	Session 3A	Panel Discussion with Industry Professionals <i>Moderator: 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>
1:05 – 1:20	Break	Pick up your Lunch
1:20 – 2:40	Session 4 (Working Lunch)	What is Working in Today’s Retirement Plans? What is Not Working in Today’s Retirement Plans? <u>Group Discussion Leaders:</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>
2:40 – 3:05	Session 5	The Ideal Plan - Interactive Discussion
3:05 – 3:15	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		