

Tuesday, August 4th, 2026
8:00 a.m. - 2:00 p.m.

Location:

Quinnipiac University
School of Medicine, Nursing and Health Sciences
370 Bassett Rd.
North Haven, CT 06473
Multipurpose Room

Adjunct Lecturer Presenting:

Michael Del Re III, AIF®, ChFC®, REBC®, CPFA®

Northeast Managing Partner

Fred Reish, Esq.

Director, ERISA Compliance & Fiduciary Strategy

Prime Capital Financial

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast/Sign-in	Sign-in Required for Continuing Education Hours
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:55 – 10:00	Session 1	Adjunct Lecturer Presenting Navigating the Next Fiduciary Shift: What the Proposed DOL Investment Selection Safe Harbor Means for Investment Committees <i>Michael Del Re III, AIF®, ChFC®, REBC®, CPFA® & Fred Reish, Esq. – Prime Capital Financial</i>
10:00 – 10:10	Break	
10:10 – 10:55	Session 2	Keynote Presentation Navigating the Crosscurrents: DC Plan Legislation, Litigation and the Road Ahead <i>Sue Walton – Capital Group</i>
10:55 – 11:45	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Michael Del Re III, AIF®, ChFC®, REBC®, CPFA®</i> <u>Panelists:</u> <i>Robert Hunt – Fidelity Investments</i> <i>Andrew Laskowski – Capital Group</i> <i>Alan Valença – T. Rowe Price</i>
11:45 – 12:00	Break	Pick up your Lunch
12:00 – 1:20	Session 4 (Working Lunch)	What is Working in Today's 401(k) Plans? What is Not Working in Today's 401(k) Plans? <u>Group Discussion Leaders:</u> <i>Paul Giovanniello – Calamos Investments LLC</i> <i>Keith Neal, C(k)P® – MFS Investment Management</i> <i>Derrick Stancick – Federated Global Investment Management Corp.</i>
1:20 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		