

Wednesday, July 29th, 2026
8:30 a.m. - 2:45 p.m.

University of Hartford
Harry Jack Gray Center
200 Bloomfield Ave.
West Hartford, CT 06117
Conference Room 1877/Room D

Adjunct Lecturers Presenting:
Lisa Buffington
Senior Vice President – Retirement Services
Ann Margaret Donnelly
Senior Sales Executive | Retirement & Wealth
Marsh McLennan Agency

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>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
9:25 – 10:25	Session 1	Adjunct Lecturers Presenting 10 Things You are Still Doing Wrong (or Not Doing Right) as a Fiduciary <i>Lisa Buffington & Ann Margaret Donnelly – Marsh McLennan Agency</i>
10:25 – 10:35	Break	
10:35 – 11:05	Session 2	Keynote Presentation Voice of the American Worker - A Franklin Templeton Study <i>Mike Dullaghan – Franklin Templeton</i>
11:05 – 11:45	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Ann Margaret Donnelly</i> <u>Panelists:</u> <i>Robert Edgar – The Standard</i> <i>Tim Gannon – J.P. Morgan Asset Management</i> <i>Craig Hartigan – Capital Group</i> <i>Benjamin Thomason, JD – Allianz Life</i>
11:45 – 11:55	Break	
11:55 – 12:35	Session 3a	Confluence of Retirement and Benefits Panel <u>Moderator:</u> <i>Brian Cox – Marsh McLennan Agency</i> <u>Panelists:</u> <i>Lisa Buffington – Marsh McLennan Agency</i> <i>Sara Rodriguez – Marsh McLennan Agency</i> <i>Larry Cass – Marsh McLennan Agency</i>
12:35 – 12:50	Break	Pick up your Lunch
12:50 – 2:10	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>Michael Andrulis & Mike Dullaghan – Franklin Templeton; Tim Gannon – J.P. Morgan Asset Management; Craig Hartigan – Capital Group; Nathan Rasmussen – Marsh McLennan Agency; Bill Thompson – Marsh McLennan Agency</i>
2:10 – 2:35	Session 5	The Ideal Plan - Interactive Discussion
2:35 – 2:45	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		