



Thursday, July 23rd, 2026
8:00 a.m. - 2:00 p.m.

Location:
University of South Florida
Marshall Student Center
4202 E. Fowler Ave
Tampa, FL 33620
Room 2709

Adjunct Lecturer Presenting:
Jamie Greenleaf, C(k)P®
Fiduciary Consultant and Principal
Greenleaf Advisors

Agenda – The Plan Sponsor University		
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 – 9:55	Session 1	Adjunct Lecturer Presenting Would You Build a House This Way? Creating a Framework for Your Health Plan <i>Jamie Greenleaf, C(k)P® – Greenleaf Advisors</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Healthcare Under Pressure: Regulation, Litigation, and the New Employer Reality <i>Jennifer Stanley, Esq. – StanleyKup Legal & Compliance</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals: Follow the Money - PBMs, Payment Integrity, and What Your Plan Is Really Paying <u>Moderator:</u> <i>Christopher Ziemke – The Prism Health Group</i> <u>Panelists:</u> <i>Jim Arnold – finHealth</i> <i>Alan Kaffenberger – TrueScripts Management Services</i> <i>Bridget Mulvenna – Capital Rx</i> <i>Kristen Ritchie – Vivid Clear Rx</i> <i>Jennifer Stanley, Esq – StanleyKup Legal & Compliance</i>
11:35 – 11:50	Break	Pick up your Lunch
11:50 – 1:15	Session 4 (Working Lunch)	Role of the Health Care Fiduciary <u>Group Discussion Leaders:</u> <i>Jim Arnold – finHealth</i> <i>Alan Kaffenberger – TrueScripts Management Services</i> <i>Bridget Mulvenna – Capital Rx</i> <i>Kristen Ritchie – Vivid Clear Rx</i> <i>Jennifer Stanley, Esq – StanleyKup Legal & Compliance</i> <i>Christopher Ziemke – The Prism Health Group</i>
1:15 – 1:45	Session 5	Action Steps/Improving Your Healthcare Plan and Controlling Costs - Interactive Discussion
1:45 – 2:00	Closing	CE Credits & Closing Statements
<i>Agenda is Subject to Change</i>		