

Thursday, August 27th, 2026
8:00 a.m. - 2:00 p.m.

Location:

Texas State University
LBJ Student Center
109 Student Center Drive
San Marcos, TX 78666
LBJSC 3rd Floor, Room 323

Adjunct Lecturer Presenting:
Jania Stout
President, Retirement & Wellness
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 – 9:55	Session 1	Adjunct Lecturer Presenting 10 Things You are Still Doing Wrong (or Not Doing Right) as a Fiduciary <i>Jania Stout – Prime Capital Financial</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Help Improve Participant Outcomes with Behavioral Insights <i>Jonathan Young – Capital Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <i>Moderator: Bentley Ford – Prime Capital Financial</i> <u>Panelists:</u> <i>Brandon McCormick – Prime Capital Financial</i> <i>Mark Murphy – Fidelity Investments</i> <i>Julie Varga – Morningstar, Inc.</i>
11:35 – 11:50	Break	Pick up your Lunch
11:50 – 1:15	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>Anne Drew Allen – Dimensional Fund Advisors</i> <i>Matt Deno – John Hancock Life Insurance Company (U.S.A.)</i> <i>Tristan Knoer – Harbor Capital Advisors</i> <i>Alyssa Rizo – Charles Schwab</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>The Agenda is Subject to Change</i>		