

Tuesday, October 6th, 2026
8:00 a.m. - 2:00 p.m.

Location:

The University of Denver
Community Commons
CCOM Grand Forum (1700)
2055 E Evans Ave
Denver, CO 80210

Adjunct Lecturer Presenting:

Fred Reish

Director of ERISA Compliance and Fiduciary Strategy
Prime Capital Financial

Agenda – TPSU <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 TPSU <i>Fred Barstein, C(k)P® – TPSU</i>
8:55 – 9:55	Session 1	Adjunct Lecturer Presenting The DOL Changes the Rules for Selecting 401(k) and 403(b) Investments <i>Fred Reish – Prime Capital Financial</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Find Trust in the Age of AI: How to Manage the Tension Between Personalization and Privacy <i>Benjamin Isgur – Fidelity Investments</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <i>Moderator: Sean Clancy – Prime Capital Financial</i> <u>Panelists:</u> <i>Brian Hoyt – Altitude Retirement Partners, LLC</i> <i>Theresa McDowell – Weaver</i> <i>Kaitlyn Vondle – Empower</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>Jim Allen – Principal Financial Group</i> <i>Evan Graves & Brett Round – T. Rowe Price</i> <i>Ben Englehart – Voya Financial</i> <i>Kaitlyn Vondle – Empower</i> <i>Sam McGibbon – J.P Morgan Asset Management</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>Agenda is Subject to Change</i>		