

Thursday, November 5th, 2026
8:00 a.m. - 2:00 p.m.

Location:
Penn State Great Valley
Main Building
30 E. Swedesford Road
Malvern, PA 19355
Room 130/131

Adjunct Lecturer Presenting:
Derek Fiorenza, C(k)P®
Chief Operating Officer | Chief Commercial Officer
Summit Group Retirement Planners, Inc.

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 <i>Sponsored by Belfint, Lyons & Shuman</i>
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 Behavioral Finance and Retirement Readiness, Participant Outcomes <i>Derek Fiorenza, C(k)P® – Summit Group Retirement Planners, Inc</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation <i>Sue Walton – Capital Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Derek Fiorenza, C(k)P®</i> <u>Panelists:</u> <i>Mike Nanz – The Standard</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>Walter Abruzzese - Dimensional Fund Advisors; Shane Conceicao – Franklin Templeton; Jamie Hopkins Esq. - Bryn Mawr Trust Hannah Lail – AllianceBernstein; Justin Muni – BlackRock Angie Senderson & Glenn Godin – American Century Investments Mike Shamon – The Standard; Derrick Stancick – Federated Hermes</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>		