

**Thursday, September 17<sup>th</sup>, 2026**  
8:00 a.m. - 2:00 p.m.

Location:

**Marquette University**  
Alumni Memorial Union  
1442 W Wisconsin Ave  
**Milwaukee, WI 53233**  
Room 157

Adjunct Lecturer Presenting:

**Todd Barden, C(k)P®**

*Founding Partner*

**Great Lakes Retirement Plan Consultants**

| <b>Agenda – The Plan Sponsor University</b><br><i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> |                                      |                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8:00 – 8:30                                                                                                        | <b>Breakfast/Sign-in</b>             | <b>Sign-in Required for Continuing Education Hours</b>                                                                                                                                                                                                                                                                                                                                                    |
| 8:30 – 8:55                                                                                                        | <b>Introduction</b>                  | <b>Introduction to The Plan Sponsor University</b><br><i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>                                                                                                                                                                                                                                                                                          |
| 8:55 – 9:55                                                                                                        | <b>Session 1</b>                     | <b>Adjunct Lecturer Presenting</b><br><b>The Ten Biggest Lies Told to 401k Plan Sponsors</b><br><i>Todd Barden, C(k)P® – Great Lakes Retirement Plan Consultants</i>                                                                                                                                                                                                                                      |
| 9:55 – 10:05                                                                                                       | <b>Break</b>                         |                                                                                                                                                                                                                                                                                                                                                                                                           |
| 10:05 – 10:50                                                                                                      | <b>Session 2</b>                     | <b>Keynote Presentation</b><br><b>Evolution of Target Date Funds</b><br><i>Ned McNally – State Street Investment Management</i>                                                                                                                                                                                                                                                                           |
| 10:50 – 11:35                                                                                                      | <b>Session 3</b>                     | <b>Panel Discussion with Industry Professionals</b><br><u>Moderator:</u> <i>Adjunct Lecturer, Todd Barden, C(k)P®</i><br><u>Panelists:</u><br><i>Jonathon Dues – Fisher Investments</i><br><i>Joe Fazio – Capital Group</i><br><i>Eric Milano – T. Rowe Price</i>                                                                                                                                         |
| 11:35 – 11:50                                                                                                      | <b>Break</b>                         | <b>Pick up your Lunch</b>                                                                                                                                                                                                                                                                                                                                                                                 |
| 11:50 – 1:15                                                                                                       | <b>Session 4<br/>(Working Lunch)</b> | <b>What is Working in Today's 401(k) Plans?</b><br><b>What is Not Working in Today's 401(k) Plans?</b><br><u>Group Discussion Leaders:</u><br><i>Nick Carpas – Cohen &amp; Steers; Jim Lowery – Pacific Life; Eric Magyar – Janus Henderson Investors; Brandon Radach – John Hancock Investments; Marta Rodriguez – J.P. Morgan Asset Management; Luke Szafranski – Transamerica Retirement Solutions</i> |
| 1:15 – 1:45                                                                                                        | <b>Session 5</b>                     | <b>The Ideal Plan - <i>Interactive Discussion</i></b>                                                                                                                                                                                                                                                                                                                                                     |
| 1:45 – 2:00                                                                                                        | <b>Closing</b>                       | <b>The C(k)PF Designation and Closing Statements</b>                                                                                                                                                                                                                                                                                                                                                      |
| <i>Agenda is Subject to Change</i>                                                                                 |                                      |                                                                                                                                                                                                                                                                                                                                                                                                           |