



Wednesday, October 7th, 2026
9:00 a.m. - 3:15 p.m.

University of San Diego
Joan B. Kroc School of Peace Studies
5555 Marian Way
San Diego, CA 92110
Conference Room KIPJ CD

Adjunct Lecturer Presenting:
Ryan Stover
Executive Vice President | Retirement Services
Marsh Agency

Agenda – TPSU		
<i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
9:00 – 9:30	Breakfast/Sign-in	Sign-in Required for Continuing Education Hours
9:30 – 9:55	Introduction	Introduction to TPSU <i>Fred Barstein, C(k)P® – TPSU</i>
9:55 – 10:55	Session 1	Adjunct Lecturer Presenting 10 Things You are Still Doing Wrong (or Not Doing Right) as a Fiduciary <i>Ryan Stover – Marsh Agency</i>
10:55 – 11:05	Break	
11:05 – 11:45	Session 2	Keynote Presentation Stop Playing Mind Games: Help Improve Participant Outcomes with Behavioral Insights <i>Jonathan Young – Capital Group</i>
11:45 – 12:25	Session 3	Panel Discussion with Industry Professionals <i>Moderator:</i> Ryan Stover – Marsh Agency <i>Panelists:</i> <i>Matthew Gray – Allianz Life</i> <i>Ken Krell – T. Rowe Price</i> <i>Andy Strandquist – Capital Group</i>
12:25 – 12:35	Break	
12:35 – 1:15	Session 3A	Confluence of Retirement & Benefits Panel <i>Moderator:</i> Ryan Stover – Marsh Agency <i>Panelists:</i> <i>Tyler Anthony – Marsh Agency</i> <i>Christina Carter – Blue Shield of California</i> <i>Chris Wilson – Marsh Agency</i>
1:15 – 2:40	Session 4 (Working Lunch)	What is Working in Today's Retirement Plans? What is Not Working in Today's Retirement Plans? <i>Group Discussion Leaders:</i> <i>Tyler Anthony – Marsh Agency; Matthew Gray – Allianz Life</i> <i>Ken Krell – T. Rowe Price; Andy Strandquist – Capital Group; Bill Thompson – Marsh Agency; Chris Wilson – Marsh Agency</i>
2:40 – 3:05	Session 5	The Ideal Plan - Interactive Discussion
3:05 – 3:15	Closing	The C(k)PF Designation and Closing Statements
Agenda is Subject to Change		

Marsh Agency legal name change effective November 2026