



Tuesday, October 20th, 2026
8:00 a.m. - 2:00 p.m.

Location:
University of Puget Sound
Wheelock Student Center
3209 N 15th St
Tacoma, WA 98406
Room: Rotunda

Adjunct Lecturer Presenting:
Rich Hultquist
Retirement Plan Consultant
SCS

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 Role of The Retirement Plan Advisor <i>Rich Hultquist – SCS</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Elevating Your Defined Contribution Plan – Latest DC Plan Trends <i>Sue Walton – Capital Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Rich Hultquist</i> <u>Panelists:</u> <i>Jeff Hunkins – Capital Group</i> <i>Mike Grimme – SCS</i> <i>Todd Moriarty – Ameritas</i> <i>Tony Panaioutu – Cascade 401(k)</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>Megan Branham – PIMCO</i> <i>Mike Foy – Reliance Trust Company</i> <i>Tim Guay – American Century</i> <i>Matt Hunter – First Eagle Investment Management</i>
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		