



Tuesday, September 29th, 2026
8:00 a.m. - 2:30 p.m.

Florida Atlantic University
Student Union Building
777 Glades Rd
Boca Raton, FL 33431
Live Oak Pavilion – Rooms C&D

Adjunct Lecturer Presenting:
Shir McGettigan, C(k)P®
*Director, Employer-Sponsored Retirement Plans,
Wealth Management Advisor*
HUB Retirement and Wealth Management

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 <i>Sponsored by Nationwide</i>
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 Participant Outcomes <i>Shir McGettigan, C(k)P® – HUB Retirement and Wealth Management</i>
9:55 – 10:05	Break	
10:05 – 10:45	Session 2	Keynote Presentation Fiduciary Fundamentals <i>Jonathan Young – Capital Group</i>
10:45 – 11:25	Session 2a	Keynote Presentation Understanding the Rapidly Evolving PEP Market. What Plan Sponsors Need to Know. <i>Danny Kling – Transamerica</i>
11:25 – 11:35	Break	
11:35 – 12:15	Session 3	Panel Discussion with Industry Professionals <i>Moderator: Mitch Starr – HUB Retirement and Wealth Management</i> <u>Panelists:</u> <i>Jason Butler – T. Rowe Price</i> <i>Perry Lazarus – Transamerica</i> <i>Greg Libby – Fidelity Investments</i> <i>Shir McGettigan, C(k)P® – HUB Retirement and Wealth Management</i> <i>MJ Zayac – AllianceBernstein</i>
12:15 – 12:30	Break	Pick up your Lunch – Sponsored by Goldman Sachs
12:30 – 1:55	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>Brett Burkhalter & Jonathan P. Savona – Voya Financial</i> <i>Bruce Cobey & Megan Wolff – John Hancock</i> <i>Dan Graham & Carlos Lopez – Principal Financial Group</i> <i>Mark Lekarczyk – MassMutual</i> <i>Charles Sosa – Capital Group</i> <i>Jeffrey A. Weaver – J.P Morgan Asset Management</i>
1:55 – 2:20	Session 5	The Ideal Plan - Interactive Discussion
2:20 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		