

Virtual TPSU Program
Wednesday, September 2nd, 2026
8:30 a.m. - 12:00 p.m. ET

Adjunct Lecturers Presenting:

Shelly Horwitz

Managing Director

World Investment Advisors

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 8:45	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
8:45 – 9:15	Session 1	Adjunct Lecturer Presenting Plan Provider RFPs and Benchmarking <i>Shelly Horwitz, AIF®, CPFA™ – World Investment Advisors</i>
9:15 – 9:45	Session 2	Keynote Presentation Fiduciary Misperceptions <i>Patrick Delaney – T. Rowe Price</i>
9:45 – 9:55	Break	
9:55 – 10:25	Session 3	Navigating the Next Era of 401(k) Plans: Structure, Strategy, and Stewardship <i><u>Moderator:</u> Michael E. Morris, CRPS, NQPA, C(k)P® – World Investment Advisors</i> <i><u>Panelists:</u></i> <i>Ryan Doyle – Capital Group</i> <i>Greg Handrahan – AllianceBernstein</i> <i>Mike Schwanekamp – MFS Investment Management</i> <i>Fred Spreen – New York Life Stable Value Investments</i>
10:25 – 11:10	Session 4	Breakout Sessions
11:10 – 11:20	Session 4a	Recaps of Groups by Facilitators
11:20 – 11:30	Break	
11:30 – 11:45	Session 5	The Ideal Plan
11:45 – 12:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		