



Thursday, October 15th, 2026
8:30 a.m. - 2:30 p.m.

Location:
Virginia Tech – Arlington Campus
Executive Briefing Center
900 Glebe Road
Arlington, VA 22203
Ballston Room

Adjunct Lecturer Presenting:
Thomas R. Leverone, C(k)P®
Senior Vice President
Hub International

Agenda – TPSU <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 9:00	Breakfast/Sign-in	Sign-in Required for Continuing Education Hours
9:00 – 9:25	Introduction	Introduction to TPSU <i>Thomas R. Leverone, C(k)P® – HUB International</i>
9:25 – 10:25	Session 1	Adjunct Lecturer Presenting Leveraging Fiduciary Best Practices to Improve Outcomes <i>Thomas R. Leverone, C(k)P® – HUB International</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation Stop Playing Mind Games: Help Improve Participant Outcomes with Behavioral Insights <i>Jonathan Young – Capital Group</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <i>Moderator: Colin Clark, C(k)P® – HUB International</i> <u>Panelists:</u> <i>Jim Dowling, C(k)P® – Fidelity Investments</i> <i>Lauren Neeno – flexPATH Strategies</i> <i>Rachel Sims – Hub International</i> <i>Justin Wilson, C(k)P® – State Street Global Advisors</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	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>Jarrett Berry – Manulife John Hancock Retirement</i> <i>Shaun Bromley – J.P Morgan Asset Management</i> <i>Mark Drake – New York Life Investments</i> <i>RJ Fetzner – PGIM Investments</i> <i>Glenn Godin – American Century Investments</i> <i>Alex Kahn – Great Gray Trust Company</i> <i>Matt Vanaman – PIMCO</i>
1:45 – 2:15	Session 5	The Ideal Plan - Interactive Discussion
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		