



**Tuesday, December 8<sup>th</sup>, 2026**  
8:30 a.m. - 2:45 p.m.

**University of Maryland**  
Samuel Riggs IV Alumni Center  
Heise and Rever Marble Hall  
7801 Alumni Dr  
**College Park, MD 20742**

Adjunct Lecturer Presenting:  
**Jim Morris**  
*Institutional Retirement Plan Consulting*  
**Marsh Agency**

| <b>Agenda – TPSU</b>                                                |                                      |                                                                                                                                                                                                                                                                                                                      |
|---------------------------------------------------------------------|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i> |                                      |                                                                                                                                                                                                                                                                                                                      |
| 8:30 – 9:00                                                         | <b>Breakfast/Sign-in</b>             | <b>Sign-in Required for Continuing Education Hours</b>                                                                                                                                                                                                                                                               |
| 9:00 – 9:25                                                         | <b>Introduction</b>                  | <b>Introduction to TPSU</b><br><i>Fred Barstein, C(k)P® – TPSU</i>                                                                                                                                                                                                                                                   |
| 9:25 – 10:25                                                        | <b>Session 1</b>                     | <b>Adjunct Lecturer Presenting</b><br><b>10 Things You are Still Doing Wrong (or Not Doing Right) as a Fiduciary</b><br><i>Jim Morris – Marsh Agency</i>                                                                                                                                                             |
| 10:25 – 10:35                                                       | <b>Break</b>                         |                                                                                                                                                                                                                                                                                                                      |
| 10:35 – 11:05                                                       | <b>Session 2</b>                     | <b>Keynote Presentation</b><br><b>Stop Playing Mind Games:</b><br><b>Help Improve Participant Outcomes with Behavioral Insights</b><br><i>John Doyle – Capital Group</i>                                                                                                                                             |
| 11:05 – 11:45                                                       | <b>Session 3</b>                     | <b>Panel Discussion with Industry Professionals</b><br><u>Moderator:</u> <i>Jim Morris – Marsh Agency</i><br><u>Panelists:</u><br><i>Joe Edmonds – T. Rowe Price</i><br><i>Dan Jess – Capital Group</i><br><i>Dan Kretz – The Standard</i>                                                                           |
| 11:45 – 11:55                                                       | <b>Break</b>                         |                                                                                                                                                                                                                                                                                                                      |
| 11:55 – 12:35                                                       | <b>Session 3a</b>                    | <b>Confluence of Retirement and Benefits Panel</b><br><u>Moderator:</u> <i>Jim Morris – Marsh Agency</i><br><u>Panelists:</u><br><i>Alli Gregory – Marsh Agency</i><br><i>Tim Kelly – Marsh Agency</i><br><i>Susan Yenyo – CareFirst BlueCross BlueShield</i>                                                        |
| 12:35 – 12:50                                                       | <b>Break</b>                         | <b>Pick up your Lunch</b>                                                                                                                                                                                                                                                                                            |
| 12:50 – 2:10                                                        | <b>Session 4<br/>(Working Lunch)</b> | <b>What is Working in Today's Retirement Plans?</b><br><b>What is Not Working in Today's Retirement Plans?</b><br><u>Group Discussion Leaders:</u><br><i>Joe Edmonds – T. Rowe Price</i><br><i>Alli Gregory &amp; Tim Kelly – Marsh Agency</i><br><i>Dan Jess – Capital Group</i><br><i>Dan Kretz – The Standard</i> |
| 2:10 – 2:35                                                         | <b>Session 5</b>                     | <b>The Ideal Plan - <i>Interactive Discussion</i></b>                                                                                                                                                                                                                                                                |
| 2:35 – 2:45                                                         | <b>Closing</b>                       | <b>The C(k)PF Designation and Closing Statements</b>                                                                                                                                                                                                                                                                 |
| <i>Agenda is Subject to Change</i>                                  |                                      |                                                                                                                                                                                                                                                                                                                      |

*Marsh Agency legal name change effective November 2026*