



Wednesday, October 14th, 2026
8:00 a.m. - 2:00 p.m.

Location:

DeSales University
DeSales University Center
2755 Station Avenue
Center Valley, PA 18034
Commonwealth Room

Adjunct Lecturer Presenting:
Brendan Speers, C(k)P®
Senior Vice President
HUB Retirement & 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
8:30 – 8:55	Introduction	Introduction to TPSU <i>Brendan Speers, C(k)P® – HUB Retirement & Wealth Management</i>
8:55 – 9:55	Session 1	Adjunct Lecturer Presenting Leveraging Fiduciary Best Practices to Improve Outcomes <i>Brendan Speers, C(k)P® – HUB Retirement & Wealth Management</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Navigating the Crosscurrents: DC Plan Legislation, Litigation and the Road Ahead <i>Sue Walton – Capital Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Brendan Speers, C(k)P®</i> <u>Panelists:</u> <i>Chris Hueth – Fidelity Investments</i> <i>Robert Lee – J.P. Morgan Wealth Management</i> <i>Matt Leeper – Capital Group</i> <i>Roman Leshak Jr. – Kreischer Miller</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>Chris Hueth – Fidelity Investments</i> <i>Robert Lee – J.P. Morgan Wealth Management</i> <i>Matt Leeper – Capital Group</i> <i>Roman Leshak Jr. – Kreischer Miller</i> <i>James Polito – Nuveen</i>
1:15 – 1:45	Session 5	The Ideal Plan - Interactive Discussion
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		