



Thursday, November 5th, 2026

8:00 a.m. - 2:00 p.m.

Location:

Penn State Great Valley

Main Building

30 E. Swedesford Road

Malvern, PA 19355

Room 130/131

Adjunct Lecturer Presenting:

Derek Fiorenza, C(k)P®

Chief Operating Officer | Chief Commercial Officer

Summit Group Retirement Planners, Inc.

Agenda – TPSU

The C(k)PF / The Certified 401(k) Plan Fiduciary Designation

8:00 – 8:30	Breakfast/Sign-in	Sign-in Required for Continuing Education Hours <i>Sponsored by Belfint, Lyons & Shuman</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 Behavioral Finance and Retirement Readiness, Participant Outcomes <i>Derek Fiorenza, C(k)P® – Summit Group Retirement Planners, Inc</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Elevating Your Defined Contribution Plan – Latest DC Plan Trends <i>Sue Walton – Capital Group</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Derek Fiorenza, C(k)P®</i> <u>Panelists:</u> <i>Jamie Hopkins Esq. - Bryn Mawr Trust</i> <i>Maria Hurd – Belfint-Lyons-Shuman</i> <i>Andrew Kalinchak – Vanguard</i> <i>Jordan McLain – T. Rowe Price</i> <i>Joe Tabella – Principal</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>Walter Abruzzese - Dimensional Fund Advisors; Marcie Blanco – Neuberger Berman; Liam Curtin - FIS Reliance Trust; Shane Conceicao – Franklin Templeton</i> <i>Krista Dietrich Koteles – Dietrich; Drew Ferraro – DWS Group; Glenn Godin – American Century Investments; Michael Harrington – Charles Schwab</i> <i>Hannah Lail – AllianceBernstein; Justin Muni – BlackRock; Dan Murphy – Amplify ETFs; Shohil Patel – Allianz; Scott Shpilberg - New York Life Investment Management; Derrick Stancick – Federated Hermes</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>		