Tuesday, October 20th, 2026
8:00 a.m. - 2:00 p.m.

Location:
University of Puget Sound
Wheelock Student Center
3209 N 15th St
Tacoma, WA 98406
Room: Rotunda

Adjunct Lecturer Presenting:
Rich Hultquist
Retirement Plan Consultant
SCS

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**
8:30 – 8:55	**Introduction**	**Introduction to TPSU** *Fred Barstein, C(k)P® – TPSU*
8:55 – 9:55	**Session 1**	**Adjunct Lecturer Presenting** **The Role of The Retirement Plan Advisor** *Rich Hultquist – SCS*
9:55 – 10:05	**Break**	
10:05 – 10:50	**Session 2**	**Keynote Presentation** **Elevating Your Defined Contribution Plan – Latest DC Plan Trends** *Sue Walton – Capital Group*
10:50 – 11:35	**Session 3**	**Panel Discussion with Industry Professionals** *Moderator: Adjunct Lecturer, Rich Hultquist* *Panelists:* *Jeff Hunkins – Capital Group* *Mike Grimme – SCS* *Todd Moriarty – Ameritas* *Tony Panagiotu – Cascade 401(k)*
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?** *Group Discussion Leaders:* *Megan Branham – PIMCO* *Mike Foy – Reliance Trust Company* *Tim Guay – American Century* *Matt Hunter – First Eagle Investment Management*
1:15 – 1:45	**Session 5**	**The Ideal Plan - *Interactive Discussion***
1:45 – 2:00	**Closing**	**The C(k)PF Designation and Closing Statements**
Agenda is Subject to Change		

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