Tuesday, December 8th, 2026
8:30 a.m. - 2:45 p.m.

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

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

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

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