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** *Sponsored by Belfint, Lyons & Shuman*
8:30 – 8:55	**Introduction**	**Introduction to TPSU** *Fred Barstein, C(k)P® - TPSU*
8:55 – 9:55	**Session 1**	**Adjunct Lecturer Presenting** **Behavioral Finance and Retirement Readiness, Participant Outcomes** *Derek Fiorenza, C(k)P® – Summit Group Retirement Planners, Inc.*
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, Derek Fiorenza, C(k)P®* *Panelists:* *John Heiser – Bryn Mawr Trust* *Christopher Hueth – Fidelity Investments* *Maria Hurd – Belfint, Lyons & Shuman, P.A.* *Andrew Kalinchak – Vanguard* *Jordan McLain – T. Rowe Price*
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:* *Walter Abruzzese - Dimensional Fund Advisors* *Glenn Godin – American Century Investments* *Alfonso Gomar – Dietrich* *Michael Harrington – Charles Schwab* *Hannah Lail – AllianceBernstein* *Justin Muni – BlackRock*
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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