

**Thursday, September 28<sup>th</sup>, 2023**  
8:30 a.m. to 2:30 p.m.

Location:

**Virginia Tech – Arlington Campus**  
Executive Briefing Center – Ballston Room  
900 Glebe Road  
**Arlington, VA 22203**

Adjunct Lecturer Presenting:  
**Colin Clark, C(k)P®**  
*Senior Vice President, Retirement*  
**HUB Retirement and Wealth Management**

<b>Agenda - The Plan Sponsor University</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 9:00	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
9:00 – 9:20	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Colin Clark, C(k)P – HUB Retirement &amp; Wealth Management</i>
9:20 – 10:20	<b>Session 1</b>	<b>The Next Level Fiduciary – What you can do as a Plan Sponsor to Help Your Employees Get Retirement Ready</b> <i>Colin Clark, C(k)P – HUB Retirement &amp; Wealth Management</i>
10:20 – 10:35	<b>Break</b>	
10:35 – 11:20	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Misbehavin’ in Retirement Plans – It’s Time to Retire That Thinking</b> Practical Strategies in Plan Design and Education from Behavioral Finance <i>Jonathan Young – American Funds</i>
11:20 – 12:05	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Tom Leverone, C(k)P – HUB Retirement &amp; Wealth Mgmt</i> <u>Panelists:</u> <i>Ivette Dominguez – Ascensus</i> <i>Matt Roberts – HUB International</i> <i>Dave Sargent – BlackRock</i>
12:05 – 12:20	<b>Break</b>	<b>Pick up your Lunch</b>
12:20 – 1:45	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today’s 401(k) Plans?</b> <b>What is Not Working in Today’s 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Mark Drake – New York Life</i> <i>Mark Mol – Macquarie Group</i> <i>Jennifer Najjar – ADP</i> <i>Matt Vanaman – PIMCO</i>
1:45 – 2:15	<b>Session 5</b>	<b>The Ideal Plan - <i>Interactive Discussion</i></b>
2:15 – 2:30	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		