Contact: Matthew Pasa

The Plan Sponsor University

Phone: 855-755-4015 Ext. 117

Email: Matt@TPSUniversity.com

FOR IMMEDIATE RELEASE

**Certified 401(k) Plan Specialist Designation Program**

*The key to a successful employer sponsored retirement plan is concentrated continued education*

**Easton, MA –** Adjunct Lecturer James F. Sampson and industry leading panelists are presenting a Plan Sponsor University (TPSU) educational program hosted at the Stonehill College on Wednesday, January 15th.

“Mr. Sampson has embraced the concepts associated with Behavioral Finance and has become skilled in delivering those concepts through the Plan Sponsor University”, stated Steff Chalk, Executive Director of The Plan Sponsor University.

This half-day program covers essential topics pertaining to retirement plan stewardship for business owners, benefit specialists and retirement plan fiduciaries. Jim Sampson is a co-founder and the Managing Principal of Cornerstone Retirement Advisors, an RPG Member Firm.  Jim has been in the retirement plan industry for more than 16 years. Jim is a Founding Lecturer at *The Retirement Advisor University®* and an Adjunct Lecturer at *The Plan Sponsor University™*,both at UCLA Anderson School of Management Executive Education.  Jim has earned the Accredited Investment Fiduciary™ and the C(k)P® - *Certified 401(k) Professional* designations and is a member of The 401k Coach® Program. Jim earned a BS in Sport Management from the University of Massachusetts, Amherst. Core areas of study during the on-site certification training event will include:

* Improvement of participant outcomes
* Improvement of plan outcomes
* Establishing the role and responsibilities of service providers/advisors
* Understanding key regulations / including DOL requirements
* Comprehending fiduciary responsibilities for qualified retirement plans
* Defining successful retirement plan management
* Explaining Behavioral Finance Theory – and how it can favorably impact outcomes
* Designing an effective plan benefit committee; and the functions of that committee

RPG is a network associated with LPL Financial

Securities and Retirement Plan Consulting Program advisory services offered through LPL Financial, Member FINRA/SIPC.  Other Investment Advisory services offered through Independent Financial Partners, a Registered Investment Advisor.  Cornerstone Retirement Advisors and Independent Financial Partners are separate entities from LPL Financial.

Space is limited. Please R.S.V.P. to: [Registar@TRAUniversity.com](mailto:Registar@TRAUniversity.com) **OR**

Contact Jennifer Pasa, TPSU Program Coordinator at 1.855.755.4015 Ext. 106

For more information and online registering visit: [www.TPSUniversity.com](http://www.TPSUniversity.com)