

Thursday, October 24, 2024
8:00 a.m. - 2:00 p.m.

Location:
Rice University
Rice Memorial Center – Farnsworth Pavilion
6100 Main Street
Houston, TX 77005

Adjunct Lecturer Presenting:
Kimberly Ellis
Fisher Retirement Solutions

Agenda The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	Breakfast / Registration	Registration & Sign-in
8:30 – 8:55	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein – The Plan Sponsor University</i>
8:55 – 9:55	Session 1	Presentation by the Adjunct Lecturer The Role of the Advisor <i>Kimberly Ellis – Fisher Retirement Solutions</i>
9:55 – 10:05	Break	
10:05 – 10:50	Session 2	Keynote Presentation Legislative Update: Secure 2.0 <i>Russell Hooker – Nova 401(k) Associates</i>
10:50 – 11:35	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Kimberly Ellis – Fisher Retirement Solutions</i> <u>Panelists:</u> <i>Nathan Fisher – Fisher Retirement Solutions</i> <i>Russell Hooker – Nova 401(k) Associates</i> <i>Alex Queen – Fisher Retirement Solutions</i>
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 <i>Not</i> Working in Today's 401(k) Plan?
1:15 – 1:45	Session 5	The Ideal Plan - <i>Interactive Discussion</i>
1:45 – 2:00	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		