

**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**

*The C(k)PF / The Certified 401(k) Plan Fiduciary Designation*

8:00 – 8:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein – The Plan Sponsor University</i>
8:55 – 9:55	<b>Session 1</b>	<b>Presentation by the Adjunct Lecturer</b> <b>The Role of the Advisor</b> <i>Kimberly Ellis – Fisher Retirement Solutions</i>
9:55 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Legislative Update: Secure 2.0</b> <i>Russell Hooker – Nova 401(k) Associates</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <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	<b>Break</b>	<b>Pick up your Lunch</b>
11:50 – 1:15	<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>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>

*Agenda is Subject to Change*