

Tuesday, August 12th, 2025

8:30 a.m. to 2:30 p.m.

Location:

George W. Bush Presidential Center

SMU Campus
2942 SMU Boulevard
Dallas, Texas 75205
The Cabinet Room

Adjunct Lecturer Presenting:

Kimberly Ellis
Client Acquisition
Fisher/SMB

Agenda – The Plan Sponsor University

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

8:30 – 9:00	Breakfast/Sign-in	Sign-in Mandatory
9:00 – 9:25	Introduction	Introduction to The Plan Sponsor University <i>Fred Barstein, C(k)P® – The Plan Sponsor University</i>
9:25 – 10:25	Session 1	Adjunct Lecturer Presenting Driving Employee Engagement <i>Kimberly Ellis – Fisher/SMB</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation Legislative Update: Secure 2.0 <i>Scott Kennedy – Nova 401(k) Associates</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Kimberly Ellis – Fisher/SMB</i> <u>Panelists:</u> <i>Cameron Barghi – Nova 401(k) Associates</i> <i>Scott Kennedy – Nova 401(k) Associates</i> <i>Alex Queen – Fisher/SMB</i>
12:05 – 12:20	Break	Pick up your Lunch
12:20 – 1:45	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?
1:45 – 2:15	Session 5	The Ideal Plan - <i>Interactive Discussion</i> <i>Alex Queen – Fisher/SMB</i>
2:15 – 2:30	Closing	The C(k)PF Designation and Closing Statements
<i>Agenda is Subject to Change</i>		