



Kimberly Ellis
Head of Strategic Partnerships
Fisher Retirement Solutions

Kimberly Ellis is the head of Strategic Partnerships at Fisher Retirement Solutions. She has 15 years of experience in the retirement industry and is passionate about helping employees get on track to retire comfortably. Kimberly enjoys helping plan sponsors tailor retirement plan solutions that meet their business goals. Her deep consulting experience has made her a thought leader for helping clients navigate the retirement plan landscape. Kimberly enjoys traveling with her husband and 2 daughters, she embodies a strong dedication to her profession and her community.



Patrick Carvey
Partner
Armanino

Patrick began his career in 2005 at KPMG in Dallas, Texas, where he focused on financial statement audits. Prior to joining Armanino, he served as a Partner at Holtzman Partners, specializing in financial statement audits of privately held businesses and of employee benefit plans. Patrick's prior experience includes roles as an auditor at BKD (now FORVIS) and as a consultant for an employee benefit plan administrator.

Patrick possesses a unique talent for swiftly grasping intricate issues and translating them into clear, actionable insights. His ability to respond to complex matters with straightforward conclusions empowers clients to make informed decisions with confidence. Patrick is dedicated to supporting clients by ensuring that their decisions align with technical accounting guidance and by identifying and sharing best practices.