

Tuesday, September 15th, 2026
8:30 a.m. - 2:30 p.m.

Location:
George W. Bush Presidential Center
SMU Campus
2942 SMU Boulevard
Dallas, Texas 75205
Cabinet Room

Adjunct Lecturer Presenting:
Kimberly Ellis
Strategic Partnerships
Fisher\SMB

Agenda – The Plan Sponsor University <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:30 – 9:00	Breakfast/Sign-in	Sign-in Required for Continuing Education Hours
9:00 – 9:25	Introduction	Introduction to The Plan Sponsor University <i>Kimberly Ellis & Alex Queen – Fisher\SMB</i>
9:25 – 10:25	Session 1	Adjunct Lecturer Presenting The Role of the Advisor <i>Kimberly Ellis & Alex Queen – Fisher\SMB</i>
10:25 – 10:35	Break	
10:35 – 11:20	Session 2	Keynote Presentation Pro Tips for a Pain-Free Retirement Plan Audit <i>Patrick Carvey – Armanino</i>
11:20 – 12:05	Session 3	Panel Discussion with Industry Professionals <u>Moderator:</u> <i>Adjunct Lecturer, Kimberly Ellis</i> <u>Panelists:</u> <i>Cameron Barghi – Nova 401(k) Associates</i> <i>Alex Queen – Fisher\SMB</i> <i>Matt Zokai – 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 Not Working in Today's 401(k) Plans? <u>Group Discussion Leaders:</u> <i>Blaine McKee – Fisher\SMB</i> <i>Artur Metke – Fisher\SMB</i> <i>Chen-Han Wang – Fisher\SMB</i> <i>Matt Zokai – Fisher\SMB</i> <i>Joe Ormont – Fisher\SMB</i>
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>The Agenda is Subject to Change</i>		