



2018 NAPA 401(k) SUMMIT Nashville, TN Continuing Education Information

NAPA Members

The NAPA 401(k) Summit offers up to 15 hours of NAPA CE credit, including up to 1 hour of NAPA Ethics CE.

Attorneys (CLE Credit)

Approved: California

Additional state CLE credit available upon request – submit requests on

<https://usaretirement.wufoo.com/forms/conference-continuing-education-request-form/>

Accountants (NASBA):

Approved for 15 CE (including 7.0 Administrative Practice and 8.0 Taxes)

Insurance Agents

Massachusetts: Pending approval

Ohio: Pending approval

West Virginia: Pending approval

Additional state insurance CE available upon request – submit requests on

<https://usaretirement.wufoo.com/forms/conference-continuing-education-request-form/>

Certified 401(k) Professionals (C(k)P® Credit)

Pending approval

Certified Financial Planners (CFP® Credit)

Approved Sessions:

1. *“Evolving” Doers: The Evolution of Target Date Funds*
2. *Hill to Summit*
3. *Generation Next*
4. *Source Spots – is 3(38) Worth it?*
5. *HSA “Mets?” – Integrating HSAs into your Practice*
6. *Stable, Valued – Stable Value Strategies in a Rising Interest Environment*
7. *Tipping “Points?” – Are we at a Tipping Point for CIT Adoption?*
8. *Pension Penchants – Cash Balance to LDI to PRT: the Transition of Traditional Pensions*

9. *ROI Story – Financial Wellness: What’s in it for you?*

Additional sessions pending approval.

Enrolled Retirement Plan Agents (ERPA Credit)

The conference is designed to provide up to 12 ERPA credits and 1 ERPA Ethics credits. The final approval as to the number of ERPA credits rests solely with the Internal Revenue Service (IRS).

IMCA Credit

Pending approval

CONTINUING EDUCATION CREDIT APPROVAL

For other types of continuing education credit, including legal or state insurance credit, please submit a request on <https://usaretirement.wufoo.com/forms/conference-continuing-education-request-form/> by March 15, 2018. NAPA staff will apply for advance approval of the program if the application process and filing fees are not prohibitive.

Please check the website periodically for updates to this document.
We will update approved credit and credit applied for as information is available.