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

Continuing Education

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, Missouri, West Virginia

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

Insurance Agents
Approved: Arizona, Virginia
Pending: Massachusetts, West Virginia

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?*
10. *Suit "Cases" – Lessons from 401(k) Litigation*
11. *Non-Qualified Success – New Ways to Connect with the C-suite*
12. *"Small" Stuff – Secrets of Profitability Working with Small Plans*

13. *"Environmental" Impacts - ESG*
14. *Ethics "Cull" – Best Practices for your Best Practice*
15. *Dancing with the (DOL, IRS, and CPA) Stars*
16. *Non-Qualified Success – New Ways to Connect with the C-Suite*

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

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Approved sessions:

1. General Session - Hill to Summit
2. HSA "Mets?" Integrating HSAs into your Practice
3. Dancing with the (DOL, IRS and CPA) Stars
4. "Environmental" Impacts – ESG
5. Source Spots - is 3(38) Worth It?
6. General Session - Generation Next
7. "Small" Stuff - Secrets of Profitably Working with Small Plans
8. "Evolving" Doers: The Evolution of Target Date Funds
9. Ethics "Cull" - Ethics Best Practices for Your Best Practice
10. Non-Qualified Success - New Ways to Connect with the C-Suite
11. Tipping "Points?" - Are We at a Tipping Point for CIT Adoption?
12. Suit "Cases" - Lessons from 401(k) Litigation
13. Stable, Valued - Stable Value Strategies in a Rising Interest Environment
14. Pension Penchants - Cash Balance to LDI to PRT: the Transition of Traditional pensions
15. Trends 'Setting' - Plan Sponsor Insights from the 2017 PSCA Annual DC Survey
16. General Session - Plan Sponsor Confidential
17. ROI Story - Financial Wellness - What's In It For You?
18. General Session - Keynote