

**2021 NAGDCA Virtual Annual Conference
Continuing Education Details**

Date	Session	Learning Objectives	CPE Credits	CPE Level	CPE Field of Study	CFP Credits	CFP Level	CFP Field of Study	SHRM PDCs	InFRE CRC
Monday, September 13 2:00 p.m.-3:15 p.m. ET	Make it Personal - Developing data driven communications	1. Learn about the impact the COVID-19 pandemic has had on communicating to older retirement plan participants. 2. Learn about marketing trends such as personalization and digital nudging. 3. Learn about the role participant data plays in delivering customized messages.	1.5	Basic	Communications and Marketing – Non-technical	0	-	-	1.25	0
Monday, September 13 2:00 p.m.-3:15 p.m. ET	The Long View - Decumulation solutions	1. Learn about retirement income solutions and the services and tools offered by recordkeepers. 2. Learn about the role of defined benefit plans. 3. Learn what public plan sponsors must consider when exploring guaranteed income solutions, advice and other decumulation strategies.	1.5	Basic	Specialized Knowledge – Technical	1.5	Overview	Retirement Savings and Income Planning	1.25	1
Tuesday, September 14 2:00 p.m.-3:15 p.m. ET	Improving Plan and Participant Outcomes through DEI Initiatives	1. Learn best practices and initiatives in the defined contribution plan industry to address historical inequities in retirement plan coverage, account balances and opportunity. 2. Learn about defined contribution plan design, investment programs and communication initiatives that support diversity, equity and inclusion goals.	1.5	Basic	Personnel/Human Resources – Non-technical	1.5	Overview	Retirement Savings and Income Planning	1.25	1
Tuesday, September 14 2:00 p.m.-3:15 p.m. ET	Understanding Plan Fees and Value Propositions	1. Learn how to evaluate and understand the costs of retirement plans. 2. Learn about the relationship between services and costs. 3. Learn best practices for benchmarking and negotiating fees.	1.5	Basic	Finance – Technical	0	-	-	1.25	1
Tuesday, September 14 3:30 p.m.-4:20 p.m. ET	DB Pensions and DC Plans - Working in tandem to achieve financial security	1. Learn tactics to educating public sector employees about the importance of utilizing multiple sources of income to ensure financial security. 2. Learn how to help public sector employees understand the roles of defined contribution plans. 3. Learn how to communicate defined contribution plan benefits to employees under the age of 40.	1	Basic	Specialized Knowledge – Technical	1	Overview	Retirement Savings and Income Planning	0	1
Wednesday, September 15 1:00 p.m.-1:50 p.m. ET	Evolution of the DC Plan Menu	1. Review the history and evolution of the defined contribution retirement plan menu. 2. Learn the pros and cons of various investment options. 3. Learn strategies and communication techniques that plan sponsors can use to enhance plan design and investments for participants.	1	Basic	Specialized Knowledge – Technical	1	Overview	Retirement Savings and Income Planning	0	1
Wednesday, September 15 2:00 p.m.-3:15 p.m. ET	Public and Private - Exploring lessons learned from both sectors	1. Learn about the differences between the private and public sectors relative to retirement planning. 2. Learn about the advantages of public sector defined contribution retirement plans. 3. Explore lessons learned in the private sector that can help public plan sponsors meet the needs of participants.	1.5	Basic	Specialized Knowledge – Technical	1.5	Overview	Retirement Savings and Income Planning	1.25	1
Wednesday, September 15 2:00 p.m.-3:15 p.m. ET	The Value of an Effective Participant Education Program	1. Learn about the various ways in which retirement education can be delivered. 2. Learn about the pros and cons of the different communication channels. 3. Learn the role education plays in a comprehensive financial wellness program.	1.5	Basic	Specialized Knowledge – Technical	1.5	Overview	Retirement Savings and Income Planning	1.25	1
Wednesday, September 15 3:30 p.m.-4:20 p.m. ET	The Next Generation of Financial Wellness	1. Learn about financial wellness program components and communication approaches to help improve financial well-being of employees. 2. Learn about the importance of data sharing with recordkeepers. 3. Learn the benefits of comprehensive financial wellness programs for both retirement plan participants and employers.	1	Basic	Specialized Knowledge – Technical	1	Overview	Retirement Savings and Income Planning	0	1