2023 NAGDCA 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	InFRE CRC	SHRM PDCs
Sunday, October 8 from 4:00 - 5:00 pm	Building Successful Board and Staff Relationships	1. Learn roles and responsibilities of plan fiduciaries. 2. Learn about common governance challenges and solutions. 3. Explore best practices for building strong relationships among plan staff, Boards, and Committees.	1	Basic	Personnel/Human Resources	1	Overview	Professional Conduct and Regulation	0	Conference Total = 7 Must attend 7 sessions.
Monday, October 9 from 11:00 am - 12:00 pm	Communicating Complex Plans	1. Learn about the unique communications challenges faced by public sector DC plans. 2. Learn innovative techniques for reaching participants. 3. Learn tips for simplifying messaging and highlighting plan enhancements.	1	Basic	Communications and Marketing	0	-	-	1	
Monday, October 9 from 11:00 am - 12:00 pm	Investments in an Uncertain World	1. Learn about common, and trending, investment options and associated risks. 2. Explore research on distribution strategies and average retiree spending. 3. Learn how to evaluate your participant base to best understand their investment needs.	1	Basic	Finance	1	Overview	Investment Planning	1	
Monday, October 9 from 11:00 am - 12:00 pm	Managing Complexities in Higher Education Plans: Lessons for All	1. Learn about unique characteristics and challenges of university sponsored retirement plans including governance structures, investment options, and employee engagement. 2. Explore lessons learned from university plans that can be applied to all public sector retirement plans.	1	Basic	Specialized Knowledge	1	Overview	Retirement Savings and Income Planning	1	
Monday, October 9 from 3:00 - 4:00 pm	Economic Outlook	1. Learn about the current market conditions and what's expected in both the short- and long-term economic forecast. 2. Learn about the impact the market is having on retirement plan participants.	1	Basic	Economics	1	Overview	General Principles of Financial Planning	1	
Tuesday, October 10 from 9:00 - 10:00 am	Building a Plan for Those Who Need it Most	1. Learn how to leverage demographic data to design retirement plans that effectively meet the needs of the employee population. 2. Explore research on differences in savings and investment behaviors among employee populations.	1	Basic	Finance	1	Overview	Retirement Savings and Income Planning	1	
Tuesday, October 10 from 10:15 - 11:15 am and repeated from 2:00 - 3:00 pm	Insights from the NAGDCA Fees Task Force	1. Learn about the purpose of the NAGDCA fees project. 2. Explore an analysis of fee cost drivers. 3. Gain understanding of the fees associated with public plans.	1	Basic	Finance	0	-	-	0	
Tuesday, October 10 from 10:15 - 11:15 am and repeated from 2:00 - 3:00 pm	RFP Best Practices for Governmental Plan Sponsors	1. Learn best practices to implement to generate the best RFP outcomes. 2. Learn about real-world experiences with conducting RFPs. 3. Learn about the responsibilities of the different parties involved in the process.	1	Basic	Finance	0	-	-	1	
Tuesday, October 10 from 10:15 - 11:15 am and repeated from 2:00 - 3:00 pm	Recruitment, Retention, and Total Employee Wellbeing	1. Learn about workplace benefits that can be offered to support and enhance the financial and holistic wellbeing of employees. 2. Learn about specific retirement plan benefits and features that can be leveraged to attract employees. 3. Explore examples of financial education programs.	1	Basic	Personnel/Human Resources	1	Overview	Retirement Savings and Income Planning	0	
Tuesday, October 10 from 3:15 - 4:15 pm	The Generational Divide in Public Retirement Plans	1. Learn about the spending and savings behavior of public sector employees. 2. Learn about retirement income and distribution strategies.	1	Basic	Specialized Knowledge	1	Overview	Retirement Savings and Income Planning	1	
Wednesday, October 11 from 9:00 - 10:00 am	Solutions to Fiduciary Challenges	1. Learn about common fiduciary challenges and solutions. 2. Learn about recent cases dealing with breaches of fiduciary duty claims and steps plan fiduciaries can take to avoid potential litigation.	1	Basic	Specialized Knowledge	1	Overview	Professional Conduct and Regulation	1	
Wednesday, October 11 from 10:15 - 11:15 am	NAGDCA Award Case Studies – Vendor Consolidation and Investment Menu Enhancement	1. Learn about the benefits of streamlining investment options for retirement plan participants. 2. Learn tips for educating employees about new investment options.	1	Basic	Finance	1	Overview	Retirement Savings and Income Planning	1	
Wednesday, October 11 from 10:15 - 11:15 am	NAGDCA Award Case Studies – Targeted Messaging	1. Learn about the benefits of developing communications for specific audiences. 2. Learn tips for successfully communicating with participants.	1	Basic	Communications and Marketing	0	-	-	1	
Wednesday, October 11 from 10:15 - 11:15 am	NAGDCA Award Case Studies – Financial Wellness	1. Learn about programs developed and offered by public sector retirement plans designed to provide financial planning education to participants. 2. Learn how concepts of behavioral finance can be leveraged to drive communication and education programs.	1	Basic	Finance	1	Overview	General Principles of Financial Planning	1	