

**2024 NAGDCA Annual Conference
Continuing Education Details**

Date	Session	Learning Objectives	CFP Credits	CFP Level	CFP Field of Study	CPE Credits	CPE Level	CPE Field of Study	InFRE CRC	SHRM PDCs
Sunday, September 15 from 3:30 - 4:30 pm	Introduction to DC Plans	1.Understand the basic structure and key components of public sector defined contribution plans. 2.Identify best practices in plan governance and administration to ensure compliance and efficiency. 3.Utilize NAGDCA's resources to enhance your understanding and management of DC plans.	0	—	—	1	Basic	Personnel/Human Resources	1	
Monday, September 16 from 10:30 - 11:30 am	Harnessing AI: Risks, Engagement, and Opportunity	1.Understand the necessity of AI governance, including the development and enforcement of policies to address risks such as bias, transparency, and security. 2.Explore how AI can enhance participant engagement and improve retirement outcomes through personalized experiences and targeted content. 3.Examine the impact of AI on investment strategies, including the use of data science and NLP to deliver superior investment performance and shape the future of the retirement planning industry.	1	Overview	Risk Management and Insurance Planning	1	Basic	Specialized Knowledge	1	
Monday, September 16 from 10:30 - 11:30 am	Target Date: The Right Answer to the Wrong Question?	1.Better understand how the differences between the goals of DB and DC plans drives differences in what they should offer. 2.Determine if there is a role for target date funds in your DC plan. 3.Learn why certain DC offerings are better complements to a DB plan and why some may be poor complements but better at addressing the human side of portfolio construction.	1	Overview	Investment Planning	1	Basic	Finance	1	
Monday, September 16 from 10:30 - 11:30 am	Mastering Strategic Contract Negotiations to Maximize Plan Success	1.Understand the primary objectives of contracting and the benefits of consistency in contract terms. 2.Learn the initial steps for plan sponsors, including procurement roles and key RFP components. 3.Discover strategies for drafting and negotiating contracts, focusing on risk mitigation and data security.	1	Overview	Risk Management and Insurance Planning	1	Basic	Finance	1	
Monday, September 16 from 3:00 - 4:00 pm	Retirement Insights Across Public Sector Segments: Strategies for Success	1.Identify and analyze the unique retirement plan challenges faced by different public sector segments, including state governments, local governments, and special districts. 2.Learn about successful strategies and best practices implemented by various public sector entities to improve retirement readiness and plan efficiency. 3.Gain insights into the latest regulatory developments affecting public sector retirement plans and how to ensure compliance while optimizing plan outcomes.	1	Overview	Retirement Savings and Income Planning	1	Basic	Specialized Knowledge	1	
Tuesday, September 17 from 10:15 - 11:15 am and repeated from 2:15 - 3:15 pm	Shared Responsibility in Cybersecurity: Protecting Retirement Plans in the Digital Age	1.Understand the essential components of a cybersecurity policy and how to tailor them to protect retirement plans effectively. 2.Learn how to assess and monitor recordkeepers' cybersecurity practices to ensure they meet high security standards and protect participant data. 3.Explore strategies to encourage participant adherence to cybersecurity protocols and gain insights into the latest threats, including AI-driven attacks and sophisticated fraud schemes, to defend against them.	1	Overview	Risk Management and Insurance Planning	1	Basic	Personnel/Human Resources	1	
Tuesday, September 17 from 10:15 - 11:15 am and repeated from 2:15 - 3:15 pm	Effective Governance and Fiduciary Excellence in Public Sector DC Plans	1.Identify and differentiate between various fiduciary classifications and their implications under ERISA and state laws. 2.Understand the importance of establishing effective governance structures, including the creation of committees and boards, and the role of fiduciary insurance. 3.Learn best practices for systemizing fiduciary education, monitoring plan practices, and evaluating the reasonableness of plan fees and investment expenses.	1	Overview	Professional Conduct and Regulation	1	Basic	Specialized Knowledge	1	
Tuesday, September 17 from 10:15 - 11:15 am and repeated from 2:15 - 3:15 pm	Demographic Dynamics and Spending Behaviors Impacting Retirement Readiness	1.Understand the dual impact of demographic data and spending patterns on retirement readiness to improve participant outcomes. 2.Explore how generational perspectives and gender differences can inform targeted retirement plan strategies. 3.Learn how household spending spikes affect retirement readiness and discover in-plan provisions, like emergency savings, to mitigate these impacts.	1	Overview	Retirement Savings and Income Planning	1	Basic	Specialized Knowledge	1	
Tuesday, September 17 from 3:45 - 4:45 pm	Empowering Retirement Readiness: Bridging Expectations with Realities	1.Understand the differing sentiments and experiences of retirees with and without pensions, and the potential changes they might have considered in their planning. 2.Evaluate the need for in-plan income solutions from a plan sponsor's perspective, considering retirement replacement rates and the specific needs of their participants. 3.Analyze the role of institutional fiduciaries in supporting plan sponsors with the due diligence and selection process for in-plan retirement income solutions, addressing common objections such as liquidity concerns, guaranteed income sufficiency, and fee pressures.	1	Overview	Retirement Savings and Income Planning	1	Basic	Finance	1	
Wednesday, September 18 from 9:00 - 10:00 am	Moving the Needle: Effective Collaborative Program and Outreach Efforts City of Milwaukee	1.Identify effective collaborative outreach strategies that enhance participant engagement and increase retirement plan participation and contribution rates. 2.Understand the importance of targeted financial wellness initiatives, such as specialized orientations and consultation opportunities, in improving financial literacy and plan awareness among specific employee groups. 3.Learn how to leverage data analytics to assess and benchmark enrollment trends, and participation and contribution rates to continuously improve program effectiveness.	1	Overview	General Principles of Financial Planning	1	Basic	Finance	1	
Wednesday, September 18 from 9:00-10:00 am	Enhancing Retirement Security: Effective Campaigns and Rollouts Missouri State Employees' Retirement System (MOSERS) and Nassau County	1. Understand how to design and implement effective educational campaigns to protect retirement savings from cyber threats. 2. Learn best practices for conducting on-site education and utilizing comprehensive communication strategies in retirement plan rollouts. 3. Gain actionable insights and practical takeaways from award-winning case studies to enhance retirement security efforts in your organization.	0	—	—	1	Basic	Communications and Marketing	1	
Wednesday, September 18 from 9:00-10:00 am	Enhancing Retirement Readiness: Innovative Tools and Engagement Strategies Municipal Employees' Retirement System (MERS) of Michigan and State of North Carolina	1.Learn how to utilize mobile applications to provide participants with real-time access to retirement plan information. 2.Understand the components of communication campaigns that promote proactive retirement planning, increased contributions, and complete beneficiary designations. 3.Gain actionable strategies from MERS and North Carolina's experiences to enhance participant engagement and improve retirement outcomes.	0	—	—	1	Basic	Communications and Marketing	1	
Wednesday, September 18 from 10:15 am - 11:15 am	Engaging a Diverse Workforce: Effective Communication Strategies for Retirement Plans	1.Learn how to create and implement communication campaigns that effectively engage various participant groups, using personalized and targeted messaging. 2.Discover best practices for improving participant engagement through one-on-one advisory sessions, clear calls-to-action, and holistic retirement readiness reviews. 3.Understand the importance of tailoring communication to meet the diverse needs of employees, ensuring messages are inclusive and culturally relevant.	0	—	—	1	Basic	Communications and Marketing	1	

**Conference
Total = 6
Must attend 6
sessions.**