2025 NAGDCA Annual Conference Continuing Education Details

Date/Time	Session Title	Learning Objectives	InFRE CRC	*CPE Credits*	*CPE Level*	*CPE Field of Study*	*CFP Credits*	*CFP Level*	*CFP Principle Knowledge Topic*	*SHRM PDCs*
Sunday, September 28 | 3:00 - 4:30 pm	**SECURE and SECURE 2.0 – Hot Topics for Governmental Plans**	1. Identify the top SECURE and SECURE 2.0 provisions most relevant to governmental defined contribution plans. 2. Understand recent regulatory guidance and practical implementation considerations. 3. Explore real-world challenges and solutions through peer discussion and expert insights.	1.5	1.5	Basic	Specialized Knowledge	1.5	Overview	Professional Conduct and Regulation	***Conference Total = 7 Must attend 7 sessions.***
Sunday, September 28 | 3:00 - 4:30 pm	**Fiduciary Best Practices for California Plans**	1. Identify key fiduciary duties and legal requirements unique to California public sector retirement plans, including obligations under state law and the California Constitution. 2. Apply best practices for selecting and monitoring service providers, managing cybersecurity risks, and retaining plan documents in compliance with IRS and state guidelines. 3. Evaluate practical approaches to mitigating fiduciary risk through prudent processes, effective delegation, and collaboration with recordkeepers and governing bodies.	1.5	1.5	Basic	Personnel/Human Resources	1.5	Overview	Professional Conduct and Regulation	
Monday, September 29 | 10:30 - 11:30 am	**The Right Choice for Public Retirement Plans: Understanding Collective Investment Trusts (CITs)**	1.Understand what Collective Investment Trusts (CITs) are, how they differ from mutual funds, and why they may be a valuable option for governmental plans. 2.Identify the benefits and challenges of adopting CITs, including cost savings, transparency, regulatory oversight, and administrative considerations. 3.Explore recent legislative efforts to expand CIT access to 403(b) plans and what they mean for public plan sponsors.	1	1	Basic	Finance	1	Overview	Retirement Savings and Income Planning	
Monday, September 29 | 10:30 - 11:30 am	**Blueprint for Retirement Income: Real-World Strategies for Public DC Plans**	1.Define the retirement income challenge facing public DC plans, including participant behavior trends, plan demographics, and the role of DB benefits. 2.Compare different types of income solutions (e.g., guaranteed vs. non-guaranteed, in-plan vs. out-of-plan) and identify the tradeoffs associated with each approach. 3.Apply practical steps for evaluating, selecting, and communicating income solutions, including frameworks for stakeholder engagement, regulatory considerations, and participant education.	1	1	Basic	Finance	1	Overview	Retirement Savings and Income Planning	
Monday, September 29 | 10:30 - 11:30 am	**Fee Benchmarking of Service Providers and Investments**	1. Identify the various types of fees associated with investments, recordkeeping, and advisory services, and understand where they may be embedded. 2. Benchmark plan-related fees using tools such as RFPs, RFIs, and industry surveys to evaluate reasonableness and competitiveness. 3. Evaluate the overall value of plan services and understand how to leverage plan size and structure to negotiate better outcomes for participants.	1	1	Basic	Specialized Knowledge	0	-	-	
Monday, September 29 | 2:45 - 3:45 pm	**AI and the Future of Public Sector Retirement: Trends, Strategy, and Impact**	1.Understand key trends driving the adoption of AI in public sector retirement and how generative AI fits into the broader landscape. 2.Learn strategic and governance considerations for responsibly incorporating AI into retirement plan operations. 3.Hear real-world examples of how AI is beginning to influence communication, operations, and decision-making in public sector retirement plans.	1	1	Basic	Specialized Knowledge	1	Overview	Risk Management and Insurance Planning	
Tuesday, September 30 | 9:00 - 10:00 am	**The Century Club: Redefining Longer Retirement**	1.Understand how demographic shifts and longevity trends are reshaping retirement planning. 2.Explore findings from Nationwide's recent research on centenarian trends and their implications. 3.Identify strategies public sector retirement plans can use to help participants prepare for longer retirements.	1	1	Basic	Communications and Marketing	1	Overview	Retirement Savings and Income Planning	
Tuesday, September 30 | 10:15 - 11:15 am and repeated | 1:45 - 2:45 pm	**Private Assets in Public DC Plans: Opportunity, Risk, and Real-World Perspectives**	1. Assess the potential benefits of private assets—such as improved returns and diversification—and understand when they may be appropriate for public DC plans. 2. Identify key fiduciary, legal, and operational aspects associated with private market investments, including liquidity, transparency, and oversight requirements. 3. Compare different implementation approaches and hear real-world perspectives—both supportive and skeptical—to better inform strategic decision-making.	1	1	Basic	Finance	1	Overview	Retirement Savings and Income Planning	
Tuesday, September 30 | 10:15 - 11:15 am and repeated | 1:45 - 2:45 pm	**Practical Applications of AI in Public Sector DC Plans: Tools, Insights, and Participant Impact**	1.Explore how AI-powered tools, including digital advisors and guided decision-making platforms, can improve participant engagement and outcomes. 2.Understand how plan-specific data can be used to deliver tailored participant experiences and generate meaningful plan-level insights. 3.Learn about the opportunities and challenges of integrating AI into retirement plan operations, with a focus on responsible implementation for plan sponsors.	1	1	Basic	Communications and Marketing	1	Overview	Risk Management and Insurance Planning	
Tuesday, September 30 | 10:15 - 11:15 am and repeated | 1:45 - 2:45 pm	**Guiding the Journey: Strategic Messaging from Hire to Retire**	1.Understand how to align communications with key employment milestones and life stages to drive engagement. 2.Learn how to use participant data to develop targeted messages that evolve with participant needs. 3.Gain practical strategies and examples for building a cohesive communication journey from onboarding through retirement.	1	1	Basic	Specialized Knowledge	0	-	-	
Tuesday, September 30 | 3:00 - 4:30 pm	**Economic Outlook & Washington Update**	1. Analyze current economic conditions and market trends to understand their potential impact on public sector retirement plans and participants. 2. Identify key federal legislative and regulatory developments—including CIT access for 403(b) plans, DOL/SEC guidance, fiduciary rulemaking, litigation reform, and SECURE 3.0—that may affect plan design, administration, and governance. 3. Evaluate how economic and policy shifts intersect to shape the strategic decisions and fiduciary responsibilities of public sector retirement plan sponsors.	1.5	0	-	-	0	-	-	
Wednesday, October 1 | 9:00 - 10:00 am	**Implementing an Effective Auto-Enrollment Strategy**	1.Understand how auto-enrollment and escalation features can be tailored to complement existing pension benefits and improve retirement readiness in the public sector. 2.Explore strategies for overcoming legal and cultural barriers, such as anti-wage garnishment laws and collective bargaining requirements. 3.Learn best practices for designing and communicating auto-features to minimize opt-outs, increase participation, and support long-term engagement.	1	1	Basic	Specialized Knowledge	1	Overview	Retirement Savings and Income Planning	
Wednesday, October 1 | 9:00-10:00 am	**Exploring different paths: Creating effective participant engagement strategies for government plans**	1.Attendees will hear about a variety of strategies to enhance participant engagement. 2. Attendees will learn how to tailor engagement to address unique groups in their population. 3. Attendees will gain insights into overcoming common barriers to engagement.	1	1	Basic	Communications and Marketing	0	-	-	
Wednesday, October 1 | 9:00-10:00 am	**Unlocking AI to Transform Public Sector Communications**	1. Understand how public sector plans are applying AI to personalize communication at scale. 2. Learn practical steps to build automated, targeted messages that drive key participant behaviors. 3. Assess whether AI tools—like content generators, chatbots, or predictive messaging—are the right fit for your plan's communication strategy.	1	1	Basic	Communications and Marketing	0	-	-	
Wednesday, October 1 | 10:15 am - 11:15 am	**Retirement by the Numbers: The State of Public DC Participants**	1.Understand how public DC participants save and the factors influencing loan behavior. 2.Recognize demographic trends in default investment acceptance and persistence. 3.Compare default behaviors in public plans to those in private-sector 401(k)s. 4.Apply research insights to enhance plan design and participant decision-making.	1	1	Basic	Finance	1	Overview	Retirement Savings and Income Planning	

For the sessions at the NAGDCA Annual Conference, no advanced preparation nor prerequisites are required.