2026 NAGDCA Annual Conference Continuing Education Details

Date/Time	Session Title	Learning Objectives	CRC®	*CPE Credits*	*CPE Level*	*CPE Field of Study*	*CFP® Credits*	*CFP® Level*	*CFP® Principle Knowledge Topic*	*SHRM PDCs*
Sunday, September 27 at 3:00 - 4:30 pm	**Fundamentals of Public Sector DC Plans Workshop**	1. Describe the key structures and characteristics of governmental defined contribution plans and the role they play in supporting retirement readiness. 2. Identify the responsibilities of plan sponsors, fiduciaries, and service providers in the governance and administration of public sector DC plans. 3. Apply fundamental concepts related to plan design, investments, and oversight to evaluate decisions that influence participant outcomes.	**1.5**	**1.5**	Basic	Specialized Knowledge	**1.5**	Overview	Retirement Savings and Income Planning	***Conference Total = 7 Must attend 7 sessions.***
Sunday, September 27 at 3:00 - 4:30 pm	**Strategic Communications for DC Plans Workshop**	1. Explain the principles that underpin effective participant communication strategies and their role in supporting plan objectives. 2. Evaluate communication approaches and messaging decisions based on audience needs and desired outcomes. 3. Develop a framework for creating more intentional and effective participant communications that drive engagement and action.	**1.5**	**1.5**	Basic	Communications and Marketing	**0**	-	-	
Monday, September 28 at 10:30 - 11:30 am and Tuesday, September 29 at 10:15 - 11:15 am	**Bridging Silos: Delivering a Unified Retirement Message Across Agencies and Programs**	1. Identify where participant communication and education are fragmented across retirement plans, benefits, and financial wellness programs. 2. Evaluate opportunities to better align messaging and collaboration across agencies, departments, or functional teams. 3. Apply practical tools to design a more cohesive, participant-centered retirement education experience within their own organization.	**1**	**1**	Basic	Communications and Marketing	**0**	-	-	
Monday, September 28 at 10:30 - 11:30 am and Tuesday, September 29 at 10:15 - 11:15 am	**From Data to Decisions: How Plan Design and Financial Advice Improve Retirement Outcomes**	1. Understand the factors influencing participant financial well-being and retirement outcomes. 2. Evaluate how plan design and financial advice affect participant behavior. 3. Identify opportunities to improve engagement through behavioral insights and personalized support.	**1**	**1**	Basic	Finance	**1**	Overview	Retirement Savings and Income Planning	
Monday, September 28 at 10:30 - 11:30 am and Tuesday, September 29 at 10:15 - 11:15 am	**Where Is the Money Going? Understanding and Reducing DC Plan Leakage in the Public Sector**	1. Define different types of DC plan outflows and distinguish between expected retirement activity and preventable leakage. 2. Examine how plan design, governance, and communication decisions influence participant behavior and retirement outcomes. 3. Identify practical strategies for measuring, monitoring, and addressing leakage throughout the participant lifecycle.	**1**	**1**	Basic	Specialized Knowledge	**1**	Overview	Retirement Savings and Income Planning	
Monday, September 28 at 10:30 - 11:30 am	**Strengthening the Connection Between Financial Wellness and Mental Health**	1. Understand how financial stress influences participant behavior, mental well-being, and retirement readiness. 2. Recognize common indicators that participants may be experiencing financial distress and understand the role employers and plan sponsors can play in supporting them. 3. Identify practical strategies to integrate financial wellness, mental health awareness, and participant support programs to improve employee and retirement outcomes.	**1**	**1**	Basic	Personnel/Human Resources	**1**	Overview	Psychology of Financial Planning	
Monday, September 28 at 2:45 - 3:45 pm	**Retirement Income Planning Across Pension and DC Systems**	1. Understand how changes in pension structures are influencing retirement outcomes. 2. Evaluate factors affecting participant confidence and retirement readiness. 3. Identify strategies that can help participants convert savings into sustainable retirement income.	**1**	**1**	Basic	Finance	**1**	Overview	Retirement Savings and Income Planning	
Tuesday, September 29 at 9:00 - 10:00 am	**Washington Update: Legislative and Regulatory Developments Impacting Public Sector Retirement Plans**	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**	**0**	-	-	**0**	-	-	
Tuesday, September 29 at 10:15 - 11:15 am	**Private Investments in DC Plans: Progress, Perspectives, and Practical Realities**	1. Understand current developments affecting the use of private investments in defined contribution plans. 2. Identify governance and implementation considerations associated with evaluating private market strategies. 3. Evaluate lessons learned and practical questions sponsors should consider when assessing private investment opportunities.	**1**	**1**	Basic	Finance	**1**	Overview	Retirement Savings and Income Planning	
Tuesday, September 29 at 1:45 - 2:45 pm and Wednesday, September 30 at 9:00 - 10:00 am	**Artificial Intelligence in Retirement Plan Administration: Balancing Innovation, Risk, and Governance**	1. Identify practical uses and limitations of AI in public retirement plan operations. 2. Recognize governance, compliance, and vendor oversight considerations associated with AI adoption. 3. Apply basic controls and policies to support responsible use of AI technologies.	**1**	**1**	Basic	Specialized Knowledge	**1**	Overview	Retirement Savings and Income Planning	
Tuesday, September 29 at 1:45 - 2:45 pm and Wednesday, September 30 at 9:00 - 10:00 am	**Beyond the Final Paycheck: Public Sector Income, Spending, and Financial Security in Retirement**	1. Understand how spending and income needs evolve throughout retirement. 2. Evaluate different approaches participants may use to generate retirement income. 3. Identify opportunities for plan sponsors to support participants during decumulation.	**1**	**1**	Basic	Specialized Knowledge	**1**	Overview	Retirement Savings and Income Planning	
Tuesday, September 29 at 1:45 - 2:45 pm and Wednesday, September 30 at 9:00 - 10:00 am	**Leveraging Participant Data to Improve Engagement and Retirement Outcomes**	1. Understand the limitations of traditional retirement readiness reporting. 2. Learn how participant data can inform engagement and plan design decisions. 3. Identify practical ways to translate analytics into measurable improvements in participant outcomes.	**1**	**1**	Basic	Personnel/Human Resources	**1**	Overview	Retirement Savings and Income Planning	
Tuesday, September 29 at 1:45 - 2:45 pm	**Rethinking Retirement Readiness in the Public Sector: New Metrics, Behaviors, and Strategies**	1. Identify key factors contributing to the gap between employees' confidence in retirement readiness and their actual retirement preparedness, including pension literacy, engagement behaviors, and financial pressures. 2. Evaluate strategies to improve participant engagement by combining pension and defined contribution education, personalized communications, and digital planning tools. 3. Apply emerging approaches—including AI-enabled personalization, behavioral insights, and targeted guidance—to better support retirement planning and improve participant outcomes.	**1**	**1**	Basic	Specialized Knowledge	**1**	Overview	Retirement Savings and Income Planning	
Tuesday, September 29 at 3:00 - 4:00 pm	**Beyond the Binary: Active, Passive, and Blended Approaches in DC Plans**	1. Understand the benefits and tradeoffs associated with active, passive, and blended approaches. 2. Evaluate factors influencing investment lineup construction and participant outcomes. 3. Identify considerations for incorporating different strategies within target date funds and core menus.	**1**	**1**	Basic	Finance	**1**	Overview	Investment Planning	
Wednesday, September 30 at 10:15 - 11:15 am	**Healthcare Costs and Retirement Readiness: Strategies for Public Sector Plans**	1. Understand the role healthcare expenses play in retirement readiness. 2. Compare key features and considerations associated with healthcare savings and reimbursement arrangements. 3. Identify opportunities to improve participant education and benefit coordination.	**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.