

CFP® (Certified Financial Planners) Session Approvals

70th Annual Employee Benefits Conference

November 10-13, 2024

San Diego, California

Each of the following sessions has been preapproved for 1.0 credit hours by the CFP® Board of Standards.

Submit one completed continuing education form per session attended. Forms will only be accepted at the conclusion of each session. No exceptions will be made. Badge scanning does NOT qualify for CE credit.

Attending a session twice will result in NO credit earned for the repeated session.

Monday, November 11

9:15-10:15 a.m.

I04-1 Working With Your Investment Professionals

P04-1 Pension Plan Actuarial Basics for the Nonactuary

10:45-11:45 a.m.

I01 Investing 101

I07-1 Total Plan and Investment Manager Benchmarking

I12-1 Investing in America's Future Infrastructure

I14-1 What If (Investment) History Repeats Itself? Looking Back to the Future

P01-1 Legal and Legislative Update for Retirement Plans

P02 Understanding Pension Plan Withdrawal Liability

P07-1 Conversation with the PBGC

P09-1 Defined Contribution Plan Risk - Options to Minimize and Mitigate

P12-1 Understanding Alternative Pension Plan Designs

1:15-2:15 p.m.

I02-1 Investments: A Fiduciary Primer

I08 Emerging Markets

I13 Real Estate: Current Status and Future Outlook

I18-1 Liability-Driven Investments - Risk Management for Pension Plans

P03 Advanced Withdrawal Liability Topics

P08-1 Effectively Communicating Your Retirement Plans

P10-1 The Impact of Noninvestment Risks on Your Pension Plan

P13-1 Variable Annuity Pension Plan - Choose Your Own Adventure

P19 SECURE 2.0 Act - Get the Most Out of Your Plan

2:45-3:45 p.m.

I03 Investing for Health and Welfare, Apprenticeship Plans

I06 Basics of Defined Contribution Plan Investments

I09-1 Fixed Income Update

I20-1 Private Credit in Your Plans

P05-1 Dueling Pension Actuaries

P11 Post-Special Financial Assistance - Keeping Your Plan Solvent

P14-1 Variable Annuity Pension Plan—Lessons Learned

P16-1 Modern Defined Contribution Plan Design

P21-1 DOL Retirement Plan Audit Trends

OVER

Tuesday, November 12

7:30-8:45 a.m.

C KEYNOTE SESSION—Economic Update

9:15-10:15 a.m.

I05-1 Stick to Your Plan: Let Your Investment Policy Statements Be Your Guide

I10-1 Alternative Investments: Private Equity

I15-1 A Deep Dive Into Asset Performance - Understanding Attribution

I21-1 Proxy Voting - Updated DOL Regulations

P06-1 Investment Consultant and Pension Actuary Conversation

P15-1 A Survey of the Retirement Landscape

P20-1 My Pension Plan is Well-Funded - Now What?

10:45-11:45 a.m.

I11-1 The Future of Equity Investing

I16-1 An Outsourced Chief Investment Officer (OCIO) Debate

I17 Investing Special Financial Assistance Funds - Now What?

I19-1 Artificial Intelligence in Investing

P13-2 Variable Annuity Pension Plan - Choose Your Own Adventure

P17-1 Challenges Facing Defined Contribution Plans

P18 SECURE 2.0 Act Update - 2024 and Beyond

P21-2 DOL Retirement Plan Audit Trends

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P08-2 Effectively Communicating Your Retirement Plans

P12-2 Understanding Alternative Pension Plan Designs

P22-1 Suspension of Benefits Retirement Plan Rules and Workforce Needs

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