CFP® (Certified Financial Planners) Session Approvals

71st Annual Employee Benefits Conference

November 9-12, 2025

Honolulu, Hawaii

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 10

9:15-10:15 a.m.
I01 Institutional Investing 101
I12 Cryptocurrency: The Impact of Deregulation for Investments
I17-1 How Artificial Intelligence Is Disrupting Markets and Reshaping the Investment Industry
P02-1 Understanding Withdrawal Liability
P07-1 Department of Labor (DOL) Retirement Plan Audit Trends
P13-1 SECURE 2.0 Act Update—2025 and Beyond
P18 Pension Scorecard

10:45-11:45 a.m.
I02-1 Investments: A Fiduciary Primer
I03-1 Investing for Health and Welfare and Apprenticeship Plans
I14-1 Interpreting Interest Rates
I21 Emerging Markets
P03-1 Advanced Withdrawal Liability Topics
P08-1 Effectively Communicating Your Pension/Retirement Plans
P10-1 My Pension Plan Is Well-funded—Now What? Part I: Understanding Pension Plan Risk
P15-1 Retirement Plan Merger Overview

1:15-2:15 p.m.
I04-1 Working With Your Investment Professionals
I06-1 Basics of Defined Contribution Plan Investments
I08-1 Private Markets—Part I: The Basics
I13-1 Asset Allocation for Today's Markets
I20 The Impact of Tariffs and Investment Restrictions on Your Portfolio
P01-1 Legal and Legislative Update for Retirement Plans
P04-1 Actuarial Basics for the Nonactuary
P11-1 My Pension Plan Is Well-Funded—Now What? Part 2: Considering Your Options
P19-1 Things You're Dying to Know About Mortality

2:45-3:45 p.m.
I05-1 Stick to Your Plan: Let Your Investment Policy Statements Be Your Guide
I09-1 Private Markets—Part II: Current Market
I19-1 The Future of Fixed Income
P05-1 Dueling Actuaries
P16-1 Asset Liability Matching Investment to Manage the Risk of Unfunded Liabilities
P17-1 Entering the Green Zone and Staying There

OVER

<u>Tuesday, November 11</u>

7:30-8:45 a.m.
C KEYNOTE SESSION—Economic Update

9:15-10:15 a.m.
I07-1 Total Plan and Investment Manager Benchmarking
I10-1 Real Estate in Your Investment Portfolio
I16 Custom Target-Date Funds
P06-1 Investment Consultant and Actuary Tango
P09-1 Defined Contribution Plan Risk—Options to Minimize and Mitigate
P12-1 Understanding Alternative Plan Designs

10:45-11:45 a.m.
I02-2 Investments: A Fiduciary Primer
I11 Understanding Real Assets in Your Portfolio
I17-2 How Artificial Intelligence Is Disrupting Markets and Reshaping the Investment Industry
I18-1 Applying Asset Liability Matching Strategies to Your Investments
P02-2 Understanding Withdrawal Liability
P05-2 Dueling Actuaries
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