

NASBA Subject Area Recommendations for Accountant CPE Credit

72nd Annual Employee Benefits Conference

October 25-28, 2026 | New Orleans, Louisiana

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

The International Foundation has been approved for group programs. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. (Note: Regulations for your state may preclude reporting credit in half-hour increments.) This is a group instructional course and is an update for CPAs regarding topical concerns in the employee benefits field.

All sessions offered may apply toward the Specialized Knowledge and Applications category of credit.

Sessions listed below qualify under the specialized topic noted:

<u>Session Title</u>	<u>Session Date and Time</u>	<u>Amount and Type of Credit</u>
OPENING SESSION—The Challenge of Change	Sunday, October 25 – 4:30-6:00 p.m.	1.0 Personal Development
KEYNOTE SESSION—The Human Advantage	Monday, October 26 – 7:30-8:45 a.m.	1.0 Personal Development
T01 – Fiduciary Responsibility in Your Apprenticeship Programs	Monday, October 26 – 9:15-10:15 a.m.	1.0 Business Law
PE1 – Public Sector Legislative and Regulatory Update	Monday, October 26 – 9:15-10:15 a.m.	1.0 Business Law
P-ACCT1 – Accountants: Update from the Department of Labor	Monday, October 26 – 9:15-10:15 a.m.	0.5 Accounting and 0.5 Auditing
G07 – Rising to the Challenge: Communications in Difficult Situations	Monday, October 26 – 9:15-10:15 a.m. <u>OR</u> Tuesday, October 27 – 10:45-11:45 a.m.	1.0 Communications and Marketing
P01 – Legal and Legislative Update for Retirement Plans	Monday, October 26 – 9:15-10:15 a.m. <u>OR</u> Tuesday, October 27 – 10:45-11:45 a.m.	1.0 Business Law
G15 – Project Management: Essential Skills for the Fund Office	Monday, October 26 – 9:15-10:15 a.m. <u>OR</u> Tuesday, October 27 – 2:45-3:45 p.m.	1.0 Personal Development
H03 – DOL Audit Trends for Health Plans	Monday, October 26 – 9:15-10:15 a.m. <u>OR</u> Tuesday, October 27 – 2:45-3:45 p.m.	1.0 Business Law
H19 – Communicating the Value of Your Health Plan	Monday, October 26 – 10:45-11:45 a.m.	1.0 Communications and Marketing
P-ACCT2 – Accountants: Addressing Industry Challenges—Sharing Best Practices for Audit Firms	Monday, October 26 – 10:45-11:45 a.m.	0.5 Accounting and 0.5 Auditing
P-ATTY1 – Attorneys: Changes to the Legal Landscape—Health Plans	Monday, October 26 – 10:45-11:45 a.m.	1.0 Business Law
F02 – Best Practices in Trustee Processes and Oversight	Monday, October 26 – 10:45-11:45 a.m. <u>OR</u> Tuesday, October 27 – 9:15-10:15 a.m.	1.0 Business Law
F10 – Cybersecurity—It’s Okay to Spend Money to Protect Member Data	Monday, October 26 – 10:45-11:45 a.m. <u>OR</u> Tuesday, October 27 – 1:15-2:15 p.m.	1.0 Information Technology
P07 – DOL Retirement Plan Audit Trends	Monday, October 26 – 10:45-11:45 a.m. <u>OR</u> Tuesday, October 27 – 1:15-2:15 p.m.	1.0 Business Law
H02 – Health Care Legal and Legislative Update	Monday, October 26 – 10:45-11:45 a.m. <u>OR</u> Tuesday, October 27 – 1:15-2:15 p.m.	1.0 Business Law
P-ATTY2 – Attorneys: Changes to the Legal Landscape—Pension Plans	Monday, October 26 – 1:15-2:15 p.m.	1.0 Business Law

OVER

<u>Session Title</u>	<u>Session Date and Time</u>	<u>Amount and Type of Credit</u>
P03 – Advanced Withdrawal Liability Topics	Monday, October 26 – 1:15-2:15 p.m. <u>OR</u> Tuesday, October 27 – 10:45-11:45 a.m.	1.0 Business Law
F04 – Wearing the Right Hat at the Right Time—The Two-Hat Dilemma	Monday, October 26 – 1:15-2:15 p.m. <u>OR</u> Tuesday, October 27 – 2:45-3:45 p.m.	1.0 Business Law
P-ACCT3 – Accountants: Lessons Learned—DOL Practice Reviews	Monday, October 26 – 2:45-3:45 p.m.	1.0 Accounting
F12 – Fiduciary Responsibilities in a Defined Contribution Plan	Monday, October 26 – 2:45-3:45 p.m. <u>OR</u> Tuesday, October 27 – 1:15-2:15 p.m.	1.0 Business Law
G17 – Communicating With Plan Participants—Case Study Examples of Success	Monday, October 26 – 2:45-3:45 p.m. <u>OR</u> Wednesday, October 28 – 7:30-8:30 a.m.	1.0 Communications and Marketing
KEYNOTE SESSION—Economic Outlook	Tuesday, October 27 – 7:30-8:45 a.m.	1.0 Economics
P-ACCT4 – Accountants: Navigating Tax Filings and Other Reports—Compliance Essentials	Tuesday, October 27 – 9:15-10:15 a.m.	1.0 Accounting
P-ATTY3 – Attorneys: Ethical Considerations	Tuesday, October 27 – 9:15-10:15 a.m.	1.0 Behavioral Ethics
F05 – Trustee Expenses	Tuesday, October 27 – 9:15-10:15 a.m. <u>OR</u> Wednesday, October 28 – 7:30-8:30 a.m.	1.0 Business Law
H09 – Using Artificial Intelligence to Manage Health Plan Operations	Tuesday, October 27 – 9:15-10:15 a.m. <u>OR</u> Wednesday, October 28 – 7:30-8:30 a.m.	1.0 Information Technology
G14 – Cybersecurity Update	Tuesday, October 27 – 9:15-10:15 a.m. <u>OR</u> Wednesday, October 28 – 9:00-10:00 a.m.	1.0 Information Technology
I11 – The Impact of Artificial Intelligence on Investing—Hype or Market Shift?	Tuesday, October 27 – 9:15-10:15 a.m. <u>OR</u> Wednesday, October 28 – 9:00-10:00 a.m.	1.0 Information Technology
T06 – Practical Applications for Using Artificial Intelligence in Your Apprenticeship Program	Tuesday, October 27 – 10:45-11:45 a.m.	1.0 Information Technology
P-ACCT5 – Accountants: Artificial Intelligence—Practical Uses and Emerging Trends	Tuesday, October 27 – 10:45-11:45 a.m.	1.0 Information Technology
P-ATTY4 – Attorneys: A Guide to Successful Plan Mergers	Tuesday, October 27 – 10:45-11:45 a.m.	1.0 Business Law
G12 – Evaluating Your Payroll Auditing Program	Tuesday, October 27 – 10:45-11:45 a.m. <u>OR</u> Wednesday, October 28 – 9:00-10:00 a.m.	1.0 Accounting
P-ATTY5 – Attorneys: From Paper to Practice—Making Policy Compliance Actually Work	Tuesday, October 27 – 1:15-2:15 p.m.	1.0 Business Law
T05 – Developing Critical Skills Needed for the Trades	Tuesday, October 27 – 1:15-2:15 p.m.	1.0 Personal Development
G13 – Artificial Intelligence Uses in the Fund Office	Tuesday, October 27 – 1:15-2:15 p.m. <u>OR</u> Wednesday, October 28 – 7:30-8:30 a.m.	1.0 Information Technology
A07 – Addressing Industry Challenges: Sharing Accounting and Auditing Best Practices in the Fund Office	Tuesday, October 27 – 2:45-3:45 p.m.	0.5 Accounting and 0.5 Auditing
P-ATTY6 – Attorneys: Trust Agreement—What Should and Should Not Be Included	Tuesday, October 27 – 2:45-3:45 p.m.	1.0 Business Law
P-ACCT6 – Accountants-Only Roundtables: Building Community	Wednesday, October 28 – 7:30-8:30 a.m.	1.0 Accounting
FINALE SESSION—The Audacity of “What If?”	Wednesday, October 28 – 10:30-11:30 a.m.	1.0 Personal Development

Total CPE Instruction (14 sessions) = 14.0 Credits

Submit one completed continuing education form per session attended. Badge scanning does NOT qualify for CE credit. Per NASBA Regulations, forms are only accepted as you leave the room at the conclusion of each session.