

## MONDAY, APRIL 20

- 2:25 – 2:55 PM **Refreshment Break**  
Exhibit Hall, Level 3
- 3:00 – 3:50 PM **WS-20: Accelerate Growth: Proven Strategies to Scale Your Retirement Plan Practice Across All Advisor Models**  
Ballroom C, Level 1
- WS-21: Work Less, Win More: AI for Prospecting Success**  
Ballroom D, Level 1  
*AI Session Series*
- WS-22: Keeping Clients Content – Retention Strategies in an Evolving Service Environment**  
Ballroom A, Level 1
- WS-23: The Retirement-to-Wealth Continuum: A Platform Face-Off Shaping the Future of Advisor Growth**  
Ballroom B, Level 1
- WS-24: Unlocking Cash Balance Plans for Growth and Impact**  
Meeting Rooms 114-117, Level 1
- 4:00 – 5:00 PM **General Session 4:**  
**What Plan Sponsors Value Most in Their Retirement Plan Advisors: A Panel Discussion**  
East Hall, Level 3
- 5:00 – 6:30 PM **Networking Reception**  
Exhibit Hall, Level 3
- 9:00 PM – 12:30 AM **Summit After Dark**  
Sparkman Wharf

## UPCOMING CONFERENCES

D.C. FLY-IN FORUM  
July 14-15, 2026

NONQUALIFIED PLAN  
CONSULTANT CONFERENCE  
September 27-29, 2026

ERISA 403(b) CONFERENCE  
October 29-30, 2026

## TUESDAY, APRIL 21

- 8:00 – 9:00 AM **Continental Breakfast**  
Meeting Room Foyer, Level 1
- 8:00 – 9:00 AM **Sponsored Sessions**  
Meeting Rooms, Level 1
- 9:15 – 10:15 AM **Sponsored Sessions**  
Meeting Rooms, Level 1
- 10:30 – 11:30 AM **General Session 5:**  
**It's NAPA-demic: The Ultimate Retirement Plan Quiz Bowl**  
East Hall, Level 3
- 12:00 – 4:00 PM **NAPA 401(k) Managed Accounts Certificate Bootcamp**  
Ballroom A, Level 1  
*\*Pre-registration Required*
- 12:00 – 4:00 PM **NAPA CPFA® Exam Cram**  
Meeting Rooms 114-117, Level 1  
*\*Pre-registration Required*

## WEDNESDAY, APRIL 22

- 9:00 – 11:30 AM **NAPA CPFA® Exam**  
Meeting Rooms 8-10, Level 3,  
Tampa Marriott Water Street  
*\*Pre-registration Required*



**NAPA**  
**401(k) SUMMIT**  
THE ADVISOR EXPERIENCE

# AGENDA AT-A-GLANCE



As of 3/11/26

# SUNDAY, APRIL 19

8:00 – 11:30 AM **NAPA Private and Digital Assets Certificate Bootcamp**  
Ballroom A, Level 1  
*\*Pre-registration Required*

8:00 – 11:30 AM **NAPA Retirement Income Certificate Bootcamp**  
Rooms 114-117, Level 1  
*\*Pre-registration Required*

8:30 – 11:00 AM **Women in Retirement Brunch**  
*\*Pre-registration Required*

11:00 AM – 12:00 PM **Lunch**  
Exhibit Hall, Level 3

12:00 – 2:00 PM **General Session 1:  
From the Hill to the Summit**  
East Hall, Level 3

2:00 – 2:40 PM **Refreshment Break**  
Exhibit Hall, Level 3

2:50 – 3:40 PM **WS-1: Beyond the Plan:  
Maximizing the Participant  
Relationship to Win  
New Business**  
Ballroom D, Level 1

**WS-2: Margins of Error: Where  
Profit and Sanity Go to Die**  
Ballroom A, Level 1

**WS-3: The Future of DC  
Investment Menus: The  
Great Debate**  
Ballroom B, Level 1

**WS-4: From Awareness to  
Action: Designing Financial  
Education that Drives  
Real Change**  
Ballroom C, Level 1

**WS-5: SECURE 2.0 and Beyond:  
Building a Playbook for  
Retirement Plan Advisors**  
Meeting Rooms 114-117, Level 1

3:50 – 4:50 PM **General Session 2:  
Entertainer Die: Attention  
in the 21<sup>st</sup> Century**  
East Hall, Level 3

5:00 – 6:30 PM **Networking Reception**  
Exhibit Hall, Level 3

7:00 – 11:00 PM **Summit After Dark**  
Front Drive, Tampa Convention  
Center

# MONDAY, APRIL 20

7:15 – 8:15 AM **Continental Breakfast**  
Exhibit Hall, Level 3

7:15 – 8:15 AM **Sponsored Sessions**  
Meeting Rooms, Level 1

8:30 – 9:30 AM **General Session 3:  
The AI Productivity Boost: How  
You Can Reclaim Time, Sharpen  
Focus, and Stay Human**  
East Hall, Level 3

9:40 – 10:30 AM **WS-6: Lawyers, Funds & Money:  
ERISA Litigation Applied to  
Your Practice**  
East Hall, Level 3

**WS-7: Building an Impactful Sales  
Process in a Virtual World**  
Ballroom C, Level 1

**WS-8: Evolving Your Business  
to Meet Your Clients' Needs:  
Maintaining and Growing Across  
Market Segments**  
Ballroom B, Level 1

**WS-9: Compliance Pitfalls &  
Practical Fixes: What Every  
Retirement Plan Advisor Needs  
to Know**  
Ballroom A, Level 1

**WS-10: The Art (and Risk) of  
Retirement Plan Minutes: Human  
Judgment Meets AI**  
Ballroom D, Level 1  
*AI Session Series*

**WS-11: Securing  
Tomorrow's Talent Today**  
Meeting Rooms 114-117, Level 1

10:40 – 11:10 AM **Refreshment Break**  
Exhibit Hall, Level 3

10:40 – 11:30 AM **WS-12: Bridging the Deal: How  
Financial Advisors Safeguard  
Retirement Benefits During M&A  
(Part 1)**  
Ballroom A, Level 1

11:10 AM – 12:15 PM **Peer-to-Peer Roundtables:  
Advisors and Home Office**  
East Hall, Level 3

11:10 AM – 12:00 PM **Hands on AI Learning Lab**  
Meeting Room 123, Level 1

11:30 AM – 12:20 PM **WS-13: The Financial Advisor's  
Technical Toolkit in M&A:  
Advanced Integration of  
Retirement Benefits (Part 2)**  
Ballroom A, Level 1

12:15 – 1:15 PM **ARA PAC Lunch**  
*\*Pre-registration Required*

12:15 – 1:15 PM **Lunch**  
Exhibit Hall, Level 3

1:25 – 2:15 PM **WS-14: How to Future Proof Your  
Practice with NQDC**  
Meeting Rooms 114-117, Level 1

**WS-15: Ditch the Busywork: Let  
AI Carry the Weight So You Can  
Focus on What Matters**  
Ballroom D, Level 1  
*AI Session Series*

**WS-16: Advisor Managed  
Accounts: Game-Changer  
or Overreach?**  
Ballroom B, Level 1

**WS-17: One Size Doesn't Fit  
All: Servicing Participants from  
Accumulation to Decumulation**  
Ballroom C, Level 1

**WS-18: Elevate Your Service  
Provider Oversight Process:  
Incorporating Cybersecurity,  
Data Protection, and More**  
Ballroom A, Level 1

**WS-19: Prudence in the Fast Lane:  
Navigating the Intersection of  
Litigation, Process, and Policy**  
East Hall, Level 3