



ASPPA
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Sessions Eligible for JBEA CE

*Not all sessions are eligible for JBEA CE. Please refer to the list below for those that qualify.
Also, all live programs are considered JBEA Formal in addition to the determination listed below.*

Sessions (1 Ethics)

CE

WS13: Ethics

1 Ethics

WS24: Charting the Depths of Ethics and Professionalism in Actuarial Practice

1 Ethics

Sessions (Core)

CE

PC2: Mergers & Acquisitions: Navigating Retirement Plan Transitions

1

PC4: Corrections in DB Plans: EPCRS Updates and Complex Scenarios

1

PC5: Beneficiaries: Getting It Right When It Matters Most

1

PC7: Challenges of DB Takeovers: Managing Transitions Effectively

1

PC10: DB AI O MY

1

WS3: Self-Employed Comp & Circumstance

1

WS12: Plan Terminations: Managing Excess Assets and Unique Challenges

1

WS16: Combined Plan Nondiscrimination Testing: Pitfalls when the Census Changes

1

WS19: Pour Some Aggregation On Me

1

WS20: Surfing with the IRS & Treasury: DB Issues Making Waves

1

WS28: Required Minimum Distributions for Defined Benefit Plans

1

WS31: Cash Balance Plans Demystified: A Guide for D.C. Professionals

1

WS32: 415 and MASD Calculations: Staying Within the Limits

1

WS38: A Walk on the Beach with DB Experts

1



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Sessions (Non-Core)	CE
PC1: Losing the PEP in Your Step	1
PC6: Starting Strong: Best Practices for Seamless Plan Transitions	1
PC8: Tales from the Alternative Investments Crypt	1
PC9: SECURE the Deal: Unlocking Start-Up Tax Credits for Maximum Client Benefit	1
GS1: 2025 Washington Update	1
WS1: Part I: Navigating Controlled Group Determinations: Private Equity, Trusts, and Overlapping Ownership	1
WS4: Regulatory Update: What's New and Developing in Retirement Plan Rules	1
GS2: Bob and Robert — Current Events Thomas J. Finnegan III Educator of the Year Award Presentation	1
WS5: Part II — The Impact of Controlled Group Status on Plan Compliance and Administration	1
WS7: Amend-a-Palooza: SECURE 2.0 & Cycle 4: Bringing the Party to Plan Document Amendments!	1
WS8: Retroactive Amendments: Managing Risk and Compliance	1
WS9: Mastering ADP/ACP Testing Post-SECURE Act: The Fine Art of Correcting a Failed ADP/ACP Test	1
WS10: Nevin & Fred	1
WS11: Designing Effective Qualified Plans Under ERISA: Navigating Automatic Enrollment, New Comparability, Stacked Matches and More	1
WS14: The Boomer Generation Retiring	1
WS15: Participant Communications	1



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Sessions (Non-Core)	CE
WS17: Bridging the Gap: Essential Client Conversations for Plan Success	1
WS18: Cracking the Code on Eligibility Rules for Qualified Plans	1
GS4: Government Update Rosenberg Awards PenChecks Scholarships	1
WS21: An Ounce of Prevention is Better than a Pound of Cure: Do We Really Have to Correct These Audit Findings?	1
WS22: Managing Rehires: Because Juggling Flaming Swords Would be Easier!	1
WS23: Data Dilemmas & Takeover Turmoil: Getting What You Need When the Records Don't Cooperate	1
WS25: Advanced Cross-Testing Adventures	1
WS26: Mastering EPCRS Corrections: Navigating SECURE 2.0 Changes and Compliance Challenges	1
WS27: Navigating the New Landscape: Roth Contributions and Catch-Up Rules Post-SECURE	1
WS29: Sales and Tales: Crafting Influence in Every Role	1
WS30: Funny Story — Tales from the Edge of 3.16	1
WS33: Lost & Found: The Great Retirement Treasure Hunt — Managing Lost Participants, Uncashed Checks and Utilizing the DOL's Retirement Savings Lost and Found Database	1
WS34: Teetering on Top Heavy: Balancing Compliance	1
GS6: Ask the Experts	2
WS36: Secure Your Serenity: Social Security Benefits with Clarity	1
WS37: SECURE Grab Bag	1