

8:30 - 9:20 AM

WS12: Balancing Design Flexibility and Fiduciary Responsibility and Future Income Needs When Evaluating Enhanced Distribution Options
Regency Ballroom AB

9:30 - 10:20 AM

WS13: Dear Prudence: Navigating the Intersection of Litigation, Process, and Policy
Grand Ballroom A-C

9:30 - 10:20 AM

WS14:
Beyond the Paycheck: Current Trends in Executive Benefits
Regency Ballroom C

9:30 - 10:20 AM

WS15: From the Dugout to the Big Leagues: AI in Retirement Plan Management
Regency Ballroom AB

10:20 - 10:40 AM

Networking Break
Foyer A

10:40 AM - 12:00 PM

General Session 5
The PSCA Benchmark Bowl
Sponsored by Income America
Grand Ballroom D-F

1:00 - 4:30 PM

Retirement Income for Plan Sponsors Certificate Bootcamp
Regency AB

 **PSCA
NATIONAL**

**SAVE
THE
DATE**

GEORGIA
Atlanta

May 3-5, 2027

*Agenda
at a Glance*

 **PSCA
NATIONAL**

**MAY 4 - 6, 2026
ST. LOUIS, MO**



 **PSCA**

**VIRTUAL
INVESTMENT
SUMMIT**

DECEMBER 1, 2026

**SAVE THE
DATE**

MONDAY, MAY 4

12:00 - 1:00 PM **Pre-Conference Workshop: What Do Participants Really Want From a Major League Employer?**
Grand Ballroom D-F

1:30 - 2:50 PM **General Session 1**
Washington Update
Sponsored by Nuveen
Grand Ballroom D-F

3:00 - 3:50 PM **WS1: HSAs: Optimizing Your Participants' Retirement Income (Implementation and Communication Considerations)**
Regency Ballroom C

3:00 - 3:50 PM **WS2: Beyond Compliance: Leveraging Secure 2.0 Optional Provisions to Strengthen Retirement Readiness**
Regency Ballroom AB

3:00 - 3:50 PM **WS3: Strengthening 401(k) Plan Security: Cybersecurity Due Diligence and Provider Oversight**
Grand Ballroom A-C

4:00 - 5:00 PM **General Session 2**
HR at the Helm: CHROs on Leading the AI Transformation
Sponsored by PNC Bank, National Association
Grand Ballroom D-F

5:00 - 6:30 PM **Welcome Reception**
Exhibit Hall, Midway West

TUESDAY, MAY 5

7:25 - 7:50 AM **Sponsored Breakfast Sessions (Block 1)**
Please refer to the Mobile App for session locations

7:30 - 8:30 AM **Breakfast**
Exhibit Hall, Midway West

7:55 - 8:20 AM **Sponsored Breakfast Sessions (Block 2)**
Please refer to the Mobile App for session locations

8:30 - 9:20 AM

8:30 - 9:20 AM

8:30 - 9:20 AM

9:30 - 10:30 AM

10:30 AM - 12:00 PM

12:00 - 1:30 PM

1:30 - 2:45 PM

1:30 - 2:45 PM

1:30 - 2:45 PM

1:30 - 2:45 PM

1:40 - 2:45 PM

2:55 - 3:45 PM

WS4: Retirement Planning: Who's on the Team and Who's Fielding the Ball?
Grand Ballroom A-C

WS5: Brokerage Windows in DC Plans: Balancing Flexibility, Risk, and Fiduciary Oversight
Regency Ballroom AB

WS6: Navigating ERISA Litigation in 401(k) Plans: Common Pitfalls and Proactive Strategies
Regency Ballroom C

Networking Break
Exhibit Hall, Midway West

General Session 3
Designing the Perfect Plan
Sponsored by Pacific Life Insurance Company
Signature Awards
Grand Ballroom D-F

Lunch
Exhibit Hall, Midway West

Small Company Plan Sponsor Roundtable (1-99 Employees)
Regency Ballroom C

Mid-Sized Company Plan Sponsor Roundtable (100-499 Employees)
Grand Ballroom A-C

Large Company Plan Sponsor Roundtable (500-2,500 Employees)
Regency Ballroom AB

Mega Company Plan Sponsor Roundtable (2,500+ Employees)
Grand Ballroom D-F

Coffee Chat with Will - for Vendors and Non-Plan Sponsors
Pegram

WS7: Retirement Plans Reimagined: Using Behavioral Strategies to Hit Home Runs for Your Participants
Grand Ballroom A-C

2:55 - 3:45 PM

2:55 - 3:45 PM

3:45 - 4:45 PM

4:45 - 6:00 PM

7:00 - 10:00 PM

7:25 - 7:50 AM

7:30 - 8:30 AM

7:55 - 8:20 AM

8:30 - 9:20 AM

8:30 - 9:20 AM

WS8: Managed Accounts: Evaluating Performance, Glide Paths, and Suitability for Diverse Workforces
Regency Ballroom AB

WS9: Plan Governance: Documenting Processes and Decisions Effectively
Regency Ballroom C

Networking Break
Exhibit Hall, Midway West

General Session 4
Saving Smarter: How to Divvy up the Dollars
Sponsored by TIAA
Grand Ballroom D-F

PSCA Party
Grand Hall

WEDNESDAY, MAY 6

Sponsored Breakfast Sessions (Block 1)
Please refer to the Mobile App for session locations

Breakfast
Midway Foyer

Sponsored Breakfast Sessions (Block 2)
Please refer to the Mobile App for session locations

WS10: Let's Find Our Missing Participants and Get Them to Cash Their Checks!
Grand Ballroom A-C

WS11: Implementing Roth and After-Tax Contributions Effectively: Driving Awareness, Adoption, and Compliance
Regency Ballroom C

