

# ERISA 403(b) ADVISOR CONFERENCE

# 2025 AGENDA

## MONDAY, SEPTEMBER 29

8:00 — 8:45 AM  
Breakfast

8:45 — 9:00 AM  
**Welcome Remarks**

9:00 — 9:50 AM  
**What's Happening? Federal Policy & Legislative Landscape**

9:45 — 10:45 AM  
**How to Navigate — Applying Regulatory Change in the Real World**

10:45 — 11:15 AM  
Break + Sponsor Engagement

11:20 AM — 12:10 PM  
**Why It Matters — Unpacking the Impact of Regulatory Change**

12:15 — 1:05 PM  
**403(b) Trends Revealed: A Behind-the-Scenes Look at the PSCA Survey and How 403(b) Plans Are Evolving**

1:05 — 2:15 PM  
Lunch

2:15 — 3:45 PM  
**Straight From the Source... What's on the Plan Sponsors' Minds?**

3:50 — 4:50 PM  
**Implications of Investment Options, Litigation, & Compliance**

5:00 — 6:30 PM  
Reception with Conference Sponsors

## TUESDAY, SEPTEMBER 30

8:00 — 9:00 AM  
Breakfast

9:00 — 10:30 AM  
**Financial Wellness and Advice**

10:30 — 11:00 AM  
Break & Sponsor Engagement

11:00 — 11:50 AM  
**Overrated or Underrated ERISA 403(b) Topics**

## THANK YOU TO OUR SPONSORS



**POST-SESSION CE  
SUBMISSION FORM**

