Sessions Eligible for Continuing Education

NAPA 401(k) SUMMIT
THE ADVISOR EXPERIENCE

Please reference the below list outlining sessions' NAPA CE and 3rd party CE eligibility. The 3rd party eligibility is outlined for the following accrediting bodies: ERPA, AIF, & CFP. Additional 3rd party CE eligibility can be found on the app or website.

General Sessions

General Sessions	NAPA CE	CFP CE	ERPA CE	AIF CE
General Session 1: From the Hill to the Summit	2.4	2	2	2
General Session 2: Entertain or Die: Attention in the 21st Century	1.2	NA	1	NA
General Session 3: The AI Productivity Boost: How You Can Reclaim Time, Sharpen Focus, and Stay Human	1.2	NA	1	NA
General Session 4: What Plan Sponsors Value Most in Their Retirement Plan Advisors: A Panel Discussion	1.2	1	1	1
General Session 5: It's NAPA-demic: The Ultimate Retirement Plan Quiz Bowl	1.2	1	NA	1

Workshops

Workshops	NAPA CE	CFP CE	ERPA CE	AIF CE
WS-1: Beyond the Plan: Maximizing the Participant Relationship to Win New Business	1	1	1	1
WS-2: Margins of Error: Where Profit and Sanity Go to Die	1	NA	1	NA
WS-3: The Future of DC Investment Menus: The Great Debate	1	1	1	1
WS-4: From Awareness to Action: Designing Financial Education that Drives Real Change	1	1	1	1
WS-5: SECURE 2.0 and Beyond: Building a Playbook for Retirement Plan Advisors	1	1	1	1
WS-6: ERISA Litigation Applied to Your Practice	1	1	1	1
WS-7: Building an Impactful Sales Process in a Virtual World	1	1	1	NA
WS-8: Evolving Your Business to Meet Your Clients' Needs: Maintaining and Growing Across Market Segments	1	1	1	1
WS-9: Compliance Pitfalls & Practical Fixes: What Every Retirement Plan Advisor Needs to Know	1	1	1	1
WS-10: The Art (and Risk) of Retirement Plan Minutes: Human Judgment Meets AI *AI Session Series*	1	1	1	1
WS-11: Securing Tomorrow's Talent Today	1	1	1	NA
WS-12: Bridging the Deal: How Financial Advisors Safeguard Retirement Benefits During M&A (Part 1)	1	1	1	1
WS-13: The Financial Advisor's Technical Toolkit in M&A: Advanced Integration of Retirement Benefits (Part 2)	1	1	1	1
WS-14: How to Future Proof Your Practice with NQDC	1	1	1	1
WS-15: Ditch the Busywork: Let AI Carry the Weight So You Can Focus on What Matters *AI Session Series*	1	NA	1	1
WS-16: Advisor Managed Accounts: Game-Changer or Overreach?	1	1	1	1
WS-17: One Size Doesn't Fit All: Servicing Participants from Accumulation to Decumulation	1	1	1	1
WS-18: Elevate Your Service Provider Oversight Process: Incorporating Cybersecurity, Data Protection, and More	1	NA	1	1
WS-19: Prudence in the Fast Lane: Navigating the Intersection of Litigation, Process, and Policy	1	1	1	1
WS-20: Accelerate Growth: Proven Strategies to Scale Your Retirement Plan Practice Across All Advisor Models	1	NA	1	NA
WS-21: Work Less, Win More: AI for Prospecting Success *AI Session Series*	1	NA	1	NA
WS-22: Keeping Clients Content – Retention Strategies in an Evolving Service Environment	1	1	1	1
WS-23: The Retirement-to-Wealth Continuum: A Platform Face-Off Shaping the Future of Advisor Growth	1	1	1	NA
WS-24: Unlocking Cash Balance Plans for Growth and Impact	1	1	1	1

Other

Other	NAPA CE	CFP CE	ERPA CE	AIF CE
Women in Retirement Brunch	1.9	NA	NA	NA
Sponsored Breakfast Sessions (various)	1	NA	NA	NA
Peer-to-Peer Roundtables: Advisors	1.3	NA	NA	NA
Peer-to-Peer Roundtables: Home Office	1.3	NA	NA	NA
Hands on AI Learning Lab	1	NA	NA	NA

Additional CE Opportunities

Additional CE Opportunities	NAPA CE	CFP CE	ERPA CE	AIF CE
NAPA Private and Digital Assets Certificate Bootcamp	3.5	3.5	NA	3.5
NAPA Retirement Income Certificate Bootcamp	3.5	3.5	NA	3.5
NAPA 401(k) Managed Accounts Certificate Bootcamp	3.5	3.5	NA	3.5
NAPA CPFA® Exam Cram	4	4	NA	4

**As of 4/7/2026*