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FOR IMMEDIATE RELEASE



Arlington, VA 22203



NAPA Launches New 401(k) Managed Accounts Certificate Program

Arlington, Va. May 21, 2025—The National Association of Plan Advisors (NAPA) launched its new 401(k) Managed Accounts Certificate program.

The NAPA 401(k) Managed Accounts Certificate empowers plan advisors with the knowledge and tools to confidently evaluate, implement, and manage managed account programs within employer-sponsored retirement plans.

Built on leading retirement education resources, this streamlined course covers key fiduciary and operational considerations, helping advisors strengthen their service model, stay competitive, and deliver greater value to clients.

What Plan Advisors Learn:

- Grasp key terminology, fiduciary roles, and the evolution of managed account programs.
- Establish a prudent process for selecting, monitoring, and replacing managed account providers, including fee benchmarking.
- Operationalize managed account programs within their practice, including both proprietary and third-party solutions.
- Navigate plan transitions effectively while identifying opportunities to integrate managed accounts into broader business strategies.
- Update core documentation and develop targeted communication strategies for plan sponsors and participants.

It's presented as an online and interactive self-paced experience, so advisors control how fast learning takes place. [More information is available here.](#)

About the National Association of Plan Advisors (NAPA)

The National Association of Plan Advisors was created by and for retirement plan advisors. Membership is also open to other retirement industry professionals who support the

interests of plan advisors. NAPA is the only advocacy group exclusively focused on the issues that matter to retirement plan advisors. NAPA is part of the American Retirement Association, based in the Washington, D.C. area. More information about NAPA is available at napa-net.org.

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