NAPA 401(K) MANAGED ACCOUNTS

Raise Your Standard. Reinforce Your Value.

NAPA 401(K) MANAGED ACCOUNTS CERTIFICATE

Earn NAPA's 401(k) Managed Accounts Certificate!

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 You 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 your 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.
- Unique education access code

How It's Presented

- **STREAMLINED CONTENT** Small chunks of information make topics easier to learn and more accessible to less experienced professionals
- **RESOURCE MATERIALS** Additional reference materials and brief advisor challenges test and reinforce mastered concepts and information
- **REAL-LIFE EXAMPLES** Case studies enhance comprehension and retention
- A **SELF-PACED EXPERIENCE** It's online and interactive, so you control how fast learning takes place

Next Steps

Ready to take the next step? Get started today by visiting **napa-net.org/401kmanagedaccounts** and use enrollment code **NAPAMA_EMPOWER**.

Questions?

Contact Ekat Sheliga at **esheliga@usaretirement.org**.

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