

NASBA Subject Area Recommendations for Accountant CPE Credit

70th Annual Employee Benefits Conference

November 10-13, 2024 | San Diego, California

The International Foundation of Employee Benefit Plans is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.nasbregistry.org.

The International Foundation has been approved for group-live programs. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. (Note: Regulations for your state may preclude reporting credit in half-hour increments.) This is a group-live instructional course and is an update for CPAs regarding topical concerns in the employee benefits field.

All sessions offered may apply toward the Specialized Knowledge and Applications category of credit.

Sessions listed below qualify under the specialized topic noted:

<u>Session Title</u>	<u>Session Date and Time</u>	<u>Amount and Type of Credit</u>
OPENING SESSION—History Lessons from Epic Presidential Races	Sunday, November 10 – 4:30-6:00 p.m.	1.0 Personal Development
KEYNOTE SESSION: The AI-Powered Organization	Monday, November 11 – 7:30-8:45 a.m.	1.0 Information Technology
G01 – FEATURED SESSION – DOL Update	Monday, November 11 – 9:15-10:15 a.m.	1.0 Business Law
G04 – Communicating with Plan Participants	Monday, November 11 – 10:45-11:45 a.m. OR Wednesday, November 13 – 9:00-10:00 a.m.	1.0 Communication
G05 – Cybersecurity Update – Where Are We Now?	Monday, November 11 – 10:45-11:45 a.m. OR Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Information Technology
P01 – Legal and Legislative Update for Retirement Plans	Monday, November 11 – 10:45-11:45 a.m. OR Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Business Law
P-ACCT1 – Accountants: Regulatory Update	Monday, November 11 – 10:45-11:45 a.m.	1.0 Business Law
A03 – Administrator’s Guide to Collections and Payroll Auditing	Monday, November 11 – 1:15-2:15 p.m.	1.0 Accounting
F02 – Best Practices in Trustee Processes and Oversight	Monday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
G02 – Updates in Benefits Litigation	Monday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
H02 – Health Care Legal and Legislative Update	Monday, November 11 – 1:15-2:15 p.m. OR Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Business Law
H14 – Best Practices in Health Plan Cybersecurity	Monday, November 11 – 1:15-2:15 p.m. OR Tuesday, November 12 – 2:45-3:45 p.m.	1.0 Information Technology
P03 – Advanced Withdrawal Liability Topics	Monday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
P08 – Effectively Communicating Your Retirement Plans	Monday, November 11 – 1:15-2:15 p.m. OR Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Communication
P-ACCT2 – Accountants: Best Practices in Audit Quality	Monday, November 11 – 1:15-2:15 p.m.	1.0 Auditing
P-ATTY2 – Attorneys: Regulatory Update for Attorneys	Monday, November 11 – 1:15-2:15 p.m.	1.0 Business Law
P-ACCT3 – Accountants: The Future of the Audit Professional	Monday, November 11 – 2:45-3:45 p.m.	1.0 Personnel/Human Resources
P-ATTY4 – Attorneys: Ethical Considerations	Monday, November 11 – 2:45-3:45 p.m.	1.0 Behavioral Ethics
KEYNOTE SESSION: Economic Update	Tuesday, November 12 – 7:30-8:45 a.m.	1.0 Economics
F04 – Wearing the Right Hat at the Right Time – The Two-Hat Dilemma	Tuesday, November 12 – 9:15-10:15 a.m. OR Wednesday, November 13 – 7:30-8:30 a.m.	1.0 Business Law
F05 – Trustee Expenses – In Depth	Tuesday, November 12 – 9:15-10:15 a.m. OR Wednesday, November 13 – 9:00-10:00 a.m.	1.0 Business Law
G06 – Aftermath of a DOL Cybersecurity Audit	Tuesday, November 12 – 9:15-10:15 a.m. OR Wednesday, November 13 – 7:30-8:30 a.m.	1.0 Business Law

OVER

<u>Session Title</u>	<u>Session Date and Time</u>	<u>Amount and Type of Credit</u>
P18 – SECURE 2.0 Act Update – 2024 and Beyond	Tuesday, November 12 – 10:45-11:45 a.m.	1.0 Business Law
P-ACCT4 – Accountants: Advanced Payroll Audits	Tuesday, November 12 – 10:45-11:45 a.m.	1.0 Accounting
A06 – Leadership Skills for a Healthy Workplace	Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Personal Development
F07 – Understanding Your Financial Statements and Budgeting	Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Accounting
G07-A09 – Practical Uses for Artificial Intelligence in the Fund Office	Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Information Technology
P-ACCT5 – Accountants: Intersection of Internal Controls and Cybersecurity	Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Auditing
P-ATTY5 – Attorneys: Employment Discrimination in Employee Benefits	Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Business Law
T05 – Cybersecurity Options for Your Apprenticeship Fund	Tuesday, November 12 – 1:15-2:15 p.m.	1.0 Information Technology
P-ACCT6– Accountants: Town Hall	Tuesday, November 12 – 2:45-3:45 p.m.	1.0 Accounting
P-ATTY6 – Attorneys: The State of the Law on Prohibited Transactions	Tuesday, November 12 – 2:45-3:45 p.m.	1.0 Business Law
FINALE SESSION—Moneyball: The Art of Winning an Unfair Game	Wednesday, November 13 – 10:30-11:30 a.m.	1 Personal Development

Total CPE Instruction (14 sessions) = 14.0 Credits

**Submit one completed continuing education form per session attended. Badge scanning does NOT count for CE credit.
Per NASBA Regulations, forms are only accepted at the conclusion of each session.**