



Date	Time	Title	CE Credit
Sun	12:00pm - 4:00pm	QKC Exam Cram Bootcamp	JBEA Non-Core (can offer for attendees but not included in estimate)
Sun	12:00pm - 1:15pm	Exempt "Ed": Better Options for Tax-Exempt Organizations – and You	JBEA Non-Core
Sun	12:00pm - 1:15pm	When You Assume: Set It, But Don't Forget It (optional session)	JBEA Core
Sun	1:30pm - 2:45pm	401(a)(4), Cross-Test My Plan & Hope To Pass (optional session)	JBEA Core
Sun	1:30pm - 2:45pm	'SOP Stories: Actuarial Standards of Practice (optional session)	JBEA Core, JBEA Ethics
Sun	3:00pm - 4:15pm	ESOP "Fables": Succeeding with a Powerful Succession Option (optional session)	JBEA Non-Core
Sun	3:00pm - 4:15pm	Topic "Call": (Your) Actuarial Hot Topics (optional session)	JBEA Non-Core
Sun	4:30pm - 6:00pm	"ASPPA President & President-Elect Speeches, Passing of the Gavel ARA Business Meeting General Session: 2022 WASHINGTON UPDATE"	No JBEA
Mon	8:30am - 9:45am	Hold Your Breath – We're Taking a Deep Dive Into SECURE 2.0	JBEA Non-Core
Mon	10:00am - 10:50am	"Testing...1, 2, 3: Retirement Plan Math (Session 1 of 4)"	JBEA Non-Core
Mon	10:00am - 10:50am	Why is Compensation so Complicated?	JBEA Non-Core
Mon	10:00am - 10:50am	"Guide" Paths: A Guide Inside Retirement Plan Investments	JBEA Non-Core
Mon	10:00am - 10:50am	Ethics "Cull": Actuarial Ethics and Professionalism (Part 1)	JBEA Core, JBEA Ethics
Mon	10:00am - 10:50am	Vision "Statements": Developing (and Redefining) Your Vision and Strategic Plan	No JBEA
Mon	11:05am - 11:55pm	""Test" Cases: Retirement Plan Testing (Session 2 of 4)"	JBEA Non-Core
Mon	11:05am - 11:55pm	Pay "Dazed?": Decoding the Compensation Puzzle	JBEA Non-Core
Mon	11:05am - 11:55pm	EPCRS! You Made a Mistake - What's Next?	JBEA Non-Core
Mon	11:05am - 11:55pm	Actuarial Ethics and Professionalism (Part 2)	JBEA Core, JBEA Ethics
Mon	11:05am - 11:55pm	Leader "Shifts": How Leaders Create and Master a Service Oriented, Engaged Culture that Fosters Employee Growth and Improves Employee Retention	No JBEA
Mon	1:30pm - 2:45pm Deep Dives 75	"Building "Blocks": Retirement Plans: Building, Designing, Maintaining, and Redesigning Plans (Session 3 of 4)	JBEA Non-Core
Mon	1:30pm - 2:45pm Deep Dives 75	"After" Map: Building a Post-M&A Action Plan	JBEA Non-Core



JBEA CE

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Mon	1:30pm - 2:45pm Deep Dives 75	Correctional "Facilities": VCP - A Day in the Life (Well a Year In the Life)	JBEA Non-Core
Mon	1:30pm - 2:45pm Deep Dives 75	Open & Shut Case(s): Actuarial Consulting from Implementation to Termination	JBEA Core
Mon	1:30pm - 2:45pm Deep Dives 75	The Business Owners Roadmap: Seven Steps to a Business That Works (Part 1)	No JBEA
Mon	3:00pm - 3:50pm	"Retirement Plan Client Communications (Session 4 of 4)"	No JBEA
Mon	3:00pm - 3:50pm	MEPs and PEP - Should You Jump into the Pool?	No JBEA
Mon	3:00pm - 3:50pm	Court "Costs": Lessons from Litigation	JBEA Non-Core
Mon	3:00pm - 3:50pm	Regulatory Radar: DB Regulatory Update 2022	JBEA Core
Mon	3:00pm - 3:50pm	The Business Owners Roadmap: Seven Steps to a Business That Works (Part 2)	No JBEA
Mon	4:20pm - 5:35pm	Mental Health in the Finance Industry: Why We Need to Shift the Narrative, Create a Culture of Understanding, & Take Action Now	No JBEA
Tues	8:30am - 9:45am	Cybersecurity Candid Conversation	JBEA Non-Core
Tues	10:00am - 10:50am	Worldly Ways: Administering a Global Benefits Program	No JBEA
Tues	10:00am - 10:50am	Owner "Slips": Controlled Groups - Ownership Matters!	JBEA Non-Core
Tues	10:00am - 10:50am	"Wrong" Headed? DB Administration - When things go wrong (and they WILL go wrong)	JBEA Core
Tues	10:00am - 10:50am	Robot "Tics": The In and Outs of Automation: How to Get Started, Areas to Use it, Pitfalls to Avoid	No JBEA
Tues	11:05am - 11:55am	Fiduciary Duties: What is a Fiduciary?	JBEA Non-Core
Tues	11:05am - 11:55am	A Different and Complex World - Affiliated Service Groups	JBEA Non-Core
Tues	11:05am - 11:55am	Cash Balance "Cache": The (Deep) Ins and Outs and All Abouts of Cash Balance Plans	JBEA Core
Tues	11:05am - 11:55am	Growth "Spurts": How to Manage Business Risk when Practices are Growing and Evolving	No JBEA
Tues	1:30pm - 2:45pm Deep Dives 75	Response "Abilities": "It's just a retirement plan. I'm responsible for WHAT?"	No JBEA
Tues	1:30pm - 2:45pm Deep Dives 75	Help! My Plan Failed Nondiscrimination Testing	JBEA Non-Core
Tues	1:30pm - 2:45pm Deep Dives 75	Designer "Close": Combined plan design case studies (DB CORE)	JBEA Core
Tues	1:30pm - 2:45pm Deep Dives 75	"Driving Change: How to Motivate and Inspire Today's Salespeople to Maximize Sales in Your Organization"	No JBEA

October 23-26

JBEA CE

Date	Time	Title	CE Credit
Tues	3:00pm - 3:50pm	"Gray" Matters a Discussion in Ethics	JBEA Core, JBEA Ethics
Tues	3:00pm - 3:50pm	"Required" Reading? New Rules with RMDs	JBEA Core
Tues	3:00pm - 3:50pm	Retro, "Active?": Retro Plan War Stories	JBEA Core
Tues	3:00pm - 3:50pm	TPA Growth Summit Peer to Peer Roundtable	No JBEA
Tues	4:20pm - 5:35pm	General Session: RETIREMENT PLAN HORROR STORIES	No JBEA
Wed	8:30am - 9:20am	"Out" Takes: Plan Termination Strategies and Pitfalls	JBEA Core
Wed	8:30am - 9:20am	Pension "Penchants?": DB for non-actuaries	No JBEA
Wed	8:30am - 9:20am	Regulatory Radar: PBGC Update	JBEA Core
Wed	8:30am - 9:20am	Recalibrate, Rewire and Reboot Your Brand (Part 1)	No JBEA
Wed	9:35am - 10:25am	Limits "Less": Yes, You Can Provide More Benefits to Only Highly-Compensated Employees	No JBEA
Wed	9:35am - 10:25am	Notices, Notices, and More Notices	JBEA Non-Core
Wed	9:35am - 10:25am	Question "Air": Your DB Questions - Answered	JBEA Core
Wed	9:35am - 10:25am	Recalibrate, Rewire and Reboot Your Brand (Part 2)	No JBEA
Wed	10:40am - 12:00pm	General Session: ASK THE EXPERTS	JBEA Non-Core