

CIMA® (Investments & Wealth Institute) Session Approvals

71st Annual Employee Benefits Conference

November 9-12, 2025

Honolulu, Hawaii

Each of the following sessions has been preapproved for 1.0 credit hours by the Investments & Wealth Institute. **Submit one completed continuing education form per session attended. Forms will only be accepted at the conclusion of each session. No exceptions will be made. Badge scanning does NOT qualify for CE credit. Attending a session twice will result in NO credit earned for the repeated session.**

Monday, November 10

9:15-10:15 a.m.

I01 Institutional Investing 101

I12 Cryptocurrency: The Impact of Deregulation for Investments

I17-1 How Artificial Intelligence Is Disrupting Markets and Reshaping the Investment Industry

P02-1 Understanding Withdrawal Liability

P07-1 Department of Labor (DOL) Retirement Plan Audit Trends

P13-1 SECURE 2.0 Act Update—2025 and Beyond

P18 Pension Scorecard

10:45-11:45 a.m.

I02-1 Investments: A Fiduciary Primer

I03-1 Investing for Health and Welfare and Apprenticeship Plans

I14-1 Interpreting Interest Rates

I21 Emerging Markets

P03-1 Advanced Withdrawal Liability Topics

P08-1 Effectively Communicating Your Pension/Retirement Plans

P10-1 My Pension Plan Is Well-funded—Now What? Part I: Understanding Pension Plan Risk

P15-1 Retirement Plan Merger Overview

1:15-2:15 p.m.

I04-1 Working With Your Investment Professionals

I06-1 Basics of Defined Contribution Plan Investments

I08-1 Private Markets—Part I: The Basics

I13-1 Asset Allocation for Today's Markets

I20 The Impact of Tariffs and Investment Restrictions on Your Portfolio

P01-1 Legal and Legislative Update for Retirement Plans

P04-1 Actuarial Basics for the Nonactuary

P11-1 My Pension Plan Is Well-Funded—Now What? Part 2: Considering Your Options

P19-1 Things You're Dying to Know About Mortality

2:45-3:45 p.m.

I05-1 Stick to Your Plan: Let Your Investment Policy Statements Be Your Guide

I09-1 Private Markets—Part II: Current Market

I19-1 The Future of Fixed Income

P05-1 Dueling Actuaries

P16-1 Asset Liability Matching Investment to Manage the Risk of Unfunded Liabilities

P17-1 Entering the Green Zone and Staying There

OVER

Tuesday, November 11**7:30-8:45 a.m.****C KEYNOTE SESSION—Economic Update****9:15-10:15 a.m.****I07-1** Total Plan and Investment Manager Benchmarking**I10-1** Real Estate in Your Investment Portfolio**I16** Custom Target-Date Funds**P06-1** Investment Consultant and Actuary Tango**P09-1** Defined Contribution Plan Risk—Options to Minimize and Mitigate**P12-1** Understanding Alternative Plan Designs**10:45-11:45 a.m.****I02-2** Investments: A Fiduciary Primer**I11** Understanding Real Assets in Your Portfolio**I17-2** How Artificial Intelligence Is Disrupting Markets and Reshaping the Investment Industry**I18-1** Applying Asset Liability Matching Strategies to Your Investments**P02-2** Understanding Withdrawal Liability**P05-2** Dueling Actuaries**P10-2** My Pension Plan Is Well-funded—Now What? Part I: Understanding Pension Plan Risk**P14** Defined Contribution Plan Forfeiture Issues**1:15-2:15 p.m.****I04-2** Working With Your Investment Professionals**I06-2** Basics of Defined Contribution Plan Investments**I08-2** Private Markets—Part I: The Basics**I13-2** Asset Allocation for Today's Markets**P04-2** Actuarial Basics for the Nonactuary**P11-2** My Pension Plan Is Well-Funded—Now What? Part 2: Considering Your Options**P13-2** SECURE 2.0 Act Update—2025 and Beyond**P15-2** Retirement Plan Merger Overview**P16-2** Asset Liability Matching Investment to Manage the Risk of Unfunded Liabilities**2:45-3:45 p.m.****I05-2** Stick to Your Plan: Let Your Investment Policy Statements Be Your Guide**I09-2** Private Markets—Part II: Current Market**I14-2** Interpreting Interest Rates**I15-1** Investment Consultant Panel**P01-2** Legal and Legislative Update for Retirement Plans**P03-2** Advanced Withdrawal Liability Topics**P08-2** Effectively Communicating Your Pension/Retirement Plans**P19-2** Things You're Dying to Know About Mortality**Wednesday, November 12****7:30-8:30 a.m.****I07-2** Total Plan and Investment Manager Benchmarking**I10-2** Real Estate in Your Investment Portfolio**I15-2** Investment Consultant Panel**P09-2** Defined Contribution Plan Risk—Options to Minimize and Mitigate**P12-2** Understanding Alternative Plan Designs**9:00-10:00 a.m.****I03-2** Investing for Health and Welfare and Apprenticeship Plans**I18-2** Applying Asset Liability Matching Strategies to Your Investments**I19-2** The Future of Fixed Income**P06-2** Investment Consultant and Actuary Tango**P07-2** Department of Labor (DOL) Retirement Plan Audit Trends**P17-2** Entering the Green Zone and Staying There