

Taking Plan Design to New Heights

Course Overview

Designing effective qualified retirement plans that meet a plan sponsor's objectives has become somewhat of a lost art. The reasons are many: Cookie-cutter designs are easier; safe harbor designs get media attention; the flexibility of modern plan documents are overlooked; and pre-approved plans can satisfy most sponsors' needs. Attendees of this course will come to

- Appreciate the importance of the plan design process;
- Comprehend why plan design has been de-emphasized;
- Identify strategies to help ascertain plan sponsor objectives;
- Understand how to meet plan sponsor objectives using a variety of plan features; and
- Apply specific plan design options to meet objectives.

CE offered:

- "Investments & Wealth Institute® has accepted "Taking Plan Design to New Heights" for 1 hour of CE credit towards the CIMA®, CPWA®, CIMC®, and RMA® certifications."
- "CFP Board has accepted "Taking Plan Design to New Heights" for 1 hour of CE credit towards the CFP® designation."
- This program is valid for 1 PDCs toward SHRM-CP and SHRM-SCP recertification.
- To receive CE credit, you must remain logged into the video portion of the webinar for the entire program. Logging into the audio portion only is not sufficient for CE credit.

In order to be awarded the full credit hours, you must be present for the entire session, registering your attendance and departure in the webinar and answering all polling questions.

Participants will earn 1.0 CPE credit. Program is free.

Field of Study: Specialized Knowledge

Additional Information:

Prerequisites: 3-5 years experience in the industry

Who should attend: Financial Professionals and Accountants; others are welcome.

Advanced Preparations: None

Program Level: Intermediate

Delivery Method: Group Internet Based

Refunds and Cancellations: For more information regarding refund, complaint and program cancellation policies, please contact our offices at 218-828-4872 or email info@cecenterinc.com

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