

3(16) Fiduciary Outsourcing: Plan sponsors and advisors embrace this best practice trend

Course Overview

Retirement plan management has become increasingly complex. Plan sponsors must navigate evolving regulatory requirements, administrative responsibilities, and fiduciary obligations—often while pressured by resource constraints. As key stakeholders in retirement plan oversight, financial advisors often serve as the first line of defense for plan sponsors. Sponsors and their advisors can address plan administrative complexities, mitigate fiduciary liability, and improve plan outcomes with the help of a professional outsourced 3(16) fiduciary. Attend this course to understand the ins and outs of an outsourced 3(16) fiduciary arrangement, when it makes sense for a plan and how to prudently select and monitor the 3(16) provider.

Learning Objectives

- Learn why 3(16) outsourcing is a growing best practice trend.
- Identify who or what entity is a 3(16) plan administrator.
- Understand what an outsourced 3(16) plan administrator does.
- Comprehend the advisor's role in the process.
- Identify potential candidates for outsourced 3(16) plan administration services.
- Follow a process for prudently selecting and monitoring an outsourced 3(16) plan administrator.

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

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