



**The FGFOA Free Internet Based Webinar Series presents
Understanding Governmental 401(a) and 457(b)
Plan Costs & Best Practices**

Thursday, November 16, 2023

2:00 p.m. – 3:40 p.m. EDT

CPE: 2 Hours TB

Field of Study: Financial - Technical

[Click Here to Register and Join the Webinar](#)

Presenter: Jeff Patrone, SageView Advisory Group

Overview:

This webinar is designed to help attendees understand their fiduciary responsibilities as it relates to the 401(a) and/or 457(b) deferred compensation benefits offered to employees. In addition to understanding the associated costs, and the best practices for managing and optimizing these retirement plans.

Learning Objectives:

Assess Plan Compliance and Regulatory Compliance

- Familiarize participants with the legal and regulatory framework governing governmental retirement plans
- Learn about the roles and responsibilities of plan sponsors, administrators, and trustees in managing these retirement plans.
- Identify fiduciary best practices for plan governance and how to mitigate potential conflicts of interest.

Understand and Assess Plan Costs

- Explore the various costs associated with 401(a) and 457(b) plans, such as administrative fees, investment expenses, and participant fees.

- Understand the impact of different cost structures on plan performance and participant outcomes.
- Analyze real-world case studies and examples of successful governmental 401(a) and 457(b) plan management.

Optimize Participant Financial Education

- Develop strategies for effectively communicating plan features, investment choices, and financial literacy to plan participants.
- Promote participant engagement and empowerment in managing their retirement savings.

CPE Reporting Verification: Your participation will be recorded through the webinar software. You must be present and signed in the entire 100 minutes to receive credit. The FGFOA will receive a verification report after the webinar and will prepare the CPE certificates. You should receive your certificate via email in approximately 30 days.

This program being offered free of charge.

System Requirements

PC-based attendees

Required: Windows® 7, Vista, XP or 2003 Server

Macintosh®-based attendees

Required: Mac OS® X 10.4.11 (Tiger®) or newer

For additional information regarding registration please contact Karen Pastula, at kpastula@flicities.com

FGFOA 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 submitted to the National

Registry of CPE Sponsors through its website: www.learningmarket.org.

Paul Shamoun
Executive Director
Florida Government Finance Officers Association
850-701-3648
ptshamoun@flicities.com

