



Nashville Nice—NAPA 401(k) Summit Kicks Off Sunday!

BY JOHN SULLIVAN | APRIL 07, 2024

CONFERENCES & EVENTS

After all the preparation, planning, travel, and travails, the **2024 National Association of Plan Advisors (NAPA) 401(k) Summit** will start Sunday afternoon in Music City.

The Summit, the largest ever with a record-setting 2,800 advisors and exhibitors, promises discussions of retirement plan policy, product, and practice management, among other topics, during the almost 60 sessions, keynotes, presentations, and demonstrations over a three-day period.

We'll kick things off with a bang, providing you with unique insights and perspectives into the legislative and regulatory environment that will shape your practice—and your practices—in the years ahead.

Highlights on Day One include American Retirement Association (ARA) CEO Brian Graff's popular "From the Hill to the Summit," an insider's view of all that's happening inside the Beltway, which has major implications for retirement plan advisors and the tens of millions of American workers they serve.

It starts strong as attendees hear directly from current Lisa Gomez, the Department of Labor Assistant Secretary for EBSA. She and Graff will discuss current regulations, what might be over the horizon, and how they impact advisors and their clients.



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He'll provide insights into the organizations and leaders already successfully navigating this period of change and how to create a playbook for your transformation to become "future-proof."

The workshops include comparing retirement income solutions with Tom Clark of Wagner Law Group, Matthew Eickman of Qualified Plan Advisors, and Stacey Tovrov of BlackRock.

Gallagher's John Jurik, Transamerica's Stanley Kim, The Standard's Ted Schmelzle, and Strategic Retirement Partners' Phillip Senderowitz tackle PEP's Good, the Bad, and Ugly."

Bank of America's Julianne Donatelli and Oliver Hannay join J.P. Morgan's Brant Wong to discuss—what else? —artificial intelligence and how to safeguard client data.

And Retirement Leadership Forum's Wallace Blankenbaker and Suzanne Raffaele will reveal results from the first-ever NAPA Advisor Research Institute (NARI).

The survey explores key practice-level metrics around revenue, profitability, staffing, and strategic growth opportunities. The results are segmented so advisors can compare themselves to others who truly "look like" them (in terms of firm, channel, practice focus, and team size).

Summit After Dark happens on Sunday night. Broadway's neon signs illuminate the night, and the sound of country music drifts from every open door. Honky-tonk music entertains hungry advisors as they sample southern cuisine, from classic barbecue to soulful comfort food.

And it's only Day One ...

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