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NAPA 401(K) SUMMIT

From Capitol Hill to Cigar City: NAPA Summit Roars Into Tampa

Attendees will leave the Summit not just informed but better equipped to navigate what's next.

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The 2026 NAPA 401(k) Summit: The Advisor Experience rolls into Cigar City this weekend, promising sun, fun, and critically important information to help retirement plan advisors better help the hardworking Americans they serve.

A record 1,500 advisors are expected, with over 3,000 total attendees across 29 sessions and workshops in four content tracks during the three-day event.

It all kicks off (officially) in Tampa, Fla., on Sunday with American Retirement Association (ARA) CEO and NAPA Executive Director Brian Graff's highly anticipated *"From the Hill to the Summit"* presentation, featuring EBSA Assistant Secretary Daniel Aronowitz.

Aronowitz will deliver remarks on the most pressing regulatory issues facing employer-sponsored retirement plans. His perspective will spotlight EBSA's compliance priorities and enforcement themes advisors need on their dashboard.

ARA policy experts Kelsey Mayo and Josh Oppenheimer will then join Gaff as he shares his vision for the year ahead in Washington. From Capitol Hill strategy to White House momentum, expect practical insight into what's gaining traction and how it affects retirement advisors, sponsors, and – most importantly – participants.

Day one workshops include *"Beyond the Plan: Maximizing the Participant Relationship to Win New Business,"* with high-

profile industry personalities Jessica Ballin, Tom Clark, Melissa Doucette, and Lauren Loehning.

Randy Fuss will deliver “Margins of Error: Where Profit and Sanity Go to Die,” and Kizzy Gaul and Gina Buchholz will host “SECURE 2.0 and Beyond: Building a Playbook for Retirement Plan Advisors.”

It’s just a sampling of the Sunday offerings before Mike Cessario, Founder and CEO of Liquid Death, one of the fastest growing non-alcoholic beverage brands, hits the general session stage to explain why entertainment and storytelling are critical to marketing success – and why so few actually do it.

After a long day of travel and information, Summit After Dark begins with an opening set by DJ Shadowman, before an exclusive concert from none other than Flo Rida.

Day two begins with several sponsored breakfast sessions before Joe Mechlinski, a social entrepreneur, impact investor, and bestselling author, kicks off the third general session, titled “The AI Productivity Boost: How You Can Reclaim Time, Sharpen Focus, and Stay Human.”

Speaking of AI, three intertwined sessions will explore how it relates to retirement advisor compliance, administration, and prospecting. It features Holly Knight, Brett Shofner, Stephen Popper, Michael Shinewald, Scott Steves, David Wu, and Tina Anstett.

Nevin Adam’s “Lawyers, Funds & Money: ERISA Litigation Applied to Your Practice,” will feature James Fleckner, Fed Reish, and Marcia Wagner.

High-profile marketing maven Rebecca Hourihan and former NAPA president Alex Assaley will deliver “Building an Impactful Sales Process in a Virtual World.”

“Securing Tomorrow’s Talent Today” will advise attendees about creating meaningful pathways to employment and will include perspectives from Rotchild Dorson, Dr. Terrance Martin, Jania Stout, and Jay Washington.

We can’t forget about Cat Ellis and Joshua Sutin’s two-part presentation, “Bridging the Deal: How Financial Advisors Safeguard Retirement Benefits During M&A.”

And “How to Future Proof Your Practice with NQDC” will feature Tampa native Jeff Acheson, Christopher D. Cervantes, and Jeff

Cheshier.

It's just a sampling of the day's sessions, in addition to the always popular advisor peer-to-peer discussions, before fun that night at the waterfront with plenty of food, games, and entertainment.

From Washington updates and compliance priorities to AI-driven efficiency and business growth tactics, attendees will leave Tampa not just informed but better equipped to navigate what's next.

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April 14, 2026

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