2008 NIPA ANNUAL FORUM & EXPO
MAY 5-7, 2008
CONTINUING EDUCATION CREDIT FORM

Please initial the sessions you have attended. To insure you receive the appropriate credits, please drop this sheet into the CEC bin at the NIPA registration Desk before leaving the conference.

Name: ______________________________

Company: ______________________________

Address: ______________________________

City/State/Zip: ______________________________

Phone: ____________________ Fax: ____________________

ATTENTION CERTIFIED FINANCIAL PLANNERS

All Certified Financial Planners attending the 2008 NIPA Annual Forum & Expo are eligible to receive 22.5 CPF Continuing Education Credits. To receive these credits please provide NIPA with your CFP ID **OR** last four digits of your Social Security Number below:

CFP ID: _____________ SS#: XXX-XX-_______________

*(**Certified Financial Planners Only**. Single Day Pass, Guest and Additional Exhibitor attendees are not eligible to receive CFP credit.)*

DATE	INITIAL	CEC
Sunday, May 4		
1:00p.m. – 4:00 p.m.		
• **Pre-Conference Education Session: Plan Conversion Workshop**	______________	3.60
Monday, May 5		
8:00 a.m. – 10:00 a.m.		
• **General Session: NIPA Celebrates 25 Years! (With More to Come)**	______________	2.40
10:30 a.m. – 11:45 a.m.		
• Automatic Enrollment: How it works	______________	1.50
• Hybrid Vehicles that Get Great Mileage: Cash Balance Plans	______________	1.50
• Cracking the Gen-X Code	______________	1.50
1:00 p.m. – 2:15 p.m.		
• You Can't Take it with You	______________	1.50
• Investments: Education, Advice and Defaults	______________	1.50
• Cash Balance Plans for DC Administrators	______________	1.50

(over)

2:45 p.m. – 4:00 p.m.

• Automatic Enrollment: Does It Work?	____________	1.50
• Secrets of Top-Producing Retirement Plan Consultants	____________	1.50
• Valuation of Alternative Investments	____________	1.50

4:15 p.m. – 5:30 p.m.

• Benefit Statements and Distribution Notices After PPA	____________	1.50
• Defined Contribution Plan Design: By the Numbers	____________	1.50
• Why (or Why Not) Put Life Insurance in a Qualified Plan	____________	1.50

Tuesday, May 6

8:30 a.m. – 10:30 a.m.

• **General Session: The Hidden Message**	____________	2.40

11:00 a.m. – 12:15 p.m.

• Déjà vu All Over Again: EGTRRA Restatements	____________	1.50
• Fee Disclosure: Informing Employers and Employees	____________	1.50
• Does Your Service Agreement Help Your Client with Compliance?	____________	1.50

1:45 p.m. – 3:00 p.m.

• 401(k) Plan Testing	____________	1.50
• The Second Time Around: EPCRS	____________	1.50
• Life After the Final 403(b) Regulations	____________	1.50

3:30 p.m. – 4:45 p.m.

• VFC and Other DOL Updates	____________	1.50
• Mock Session: Sales vs. Administration	____________	1.50
• Another Look at Cafeteria Plans	____________	1.50

Wednesday, May 7

8:15 a.m. – 10:00 a.m.

• **General Session: Washington Updates**	____________	1.50

10:15 a.m. – 11:30 a.m.

• The New ERPA Designation and Circular 230	____________	1.50
• Compensation: Foundation of a Retirement Plan	____________	1.50
• Stress-Free Distribution Reporting	____________	1.50

11:45 a.m. – 1:00 p.m.

Form 5500: More Complicated Than it Looks!	____________	1.50
• No Need to Fear When ESOP is Near!	____________	1.50
• Tax Deduction Rules After PPA	____________	1.50

TOTAL CEC ____________

NIPA is an approved sponsor as approved by the Joint Board of the Enrollment of Actuaries for Continuing Education Credit

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