osaic CONNECTED

ConnectED 2026 Pre-Conference Sessions

Breakout and pre-conference session registration opens on September 15. Watch for an **email** with everything you need to browse the **Session Catalog** and use **Schedule Builder** to reserve your spot.

Important: *Osaic Board and Council Members are required to attend the annual Council Summit from 1-3 p.m. and will be unable to participate in pre-conference sessions.*

Sunday, November 8 Agenda Overview

Time	Agenda Item
12:00-8:00 p.m.	Registration Open
1:00-3:00 p.m.	Annual Council Summit (*Invitation Only for Board & Council Members*)
1:00-3:00 p.m.	Pre-Conference Sessions (*Pre-Registration Required Starting September 15*)
5:00-6:00 p.m.	Opening General Session
6:00-7:30 p.m.	Welcome Reception & Marketplace

Pre-Conference Sessions Available

Session Name	Session Description
Deliver Greater Value to Clients: Investment Portfolio Construction Workshop (CE)	Enhance your portfolio construction expertise and elevate the value you deliver to clients in this engaging 3-hour pre-conference workshop. Earn continuing education credit while gaining practical, real-world insights into the key components of building sophisticated investment portfolios.

Session Name	Session Description
	Collaborate with your Wealth Management Platform (WMP) team and leading investment partners to explore best practices in asset allocation, risk assessment, manager selection, performance evaluation, and fee analysis. You'll also learn how to effectively incorporate alternative investments and private equity solutions to help improve client outcomes and address evolving investor needs. Receive updates on the latest platform technology, tools, and resources available through your dedicated sales support team – helping you operate more efficiently and better serve clients. Leave with actionable strategies, deeper investment knowledge, and enhanced confidence to make informed portfolio decisions that support your clients' long-term financial goals, all while earning valuable CE Credits.
NAPA Retirement Income for 401(k) Plans Certificate Program	The NAPA Retirement Income for 401(k) Plans Certificate Program is a comprehensive educational session designed to help advisors build expertise in one of the most important emerging areas of retirement planning: helping participants convert accumulated retirement savings into sustainable retirement income. During this interactive bootcamp, participants will gain a foundational understanding of retirement income concepts, terminology, and strategies that are increasingly important in today's defined contribution marketplace. The session explores the key forces driving the adoption of retirement income solutions, examines the various products and approaches available to plan sponsors and participants, and reviews the risks these solutions are designed to address. Attendees will also learn a prudent framework for evaluating, selecting, implementing, and monitoring retirement income solutions within workplace retirement plans. By the end of the program, advisors will be better equipped to engage plan sponsors in meaningful retirement income discussions, evaluate the growing range of available solutions, and support participants as they transition from saving for retirement to generating income throughout retirement. This certificate program is ideal for advisors seeking to enhance their retirement planning knowledge and expand their value as trusted retirement plan consultants.
CFP Ethics (CE)	This program fulfills the requirement for CFP Board-approved Ethics CE and educates CFP® professionals on the CFP Board's Code of Ethics and Standards of Conduct. The application of the Code and Standards is the foundation for ethical financial planning. By the end of this program, participants should be equipped to: • Understand the structure and content of the Code and Standards. • Describe CFP Board's fiduciary duty. • Identify material conflicts of interest and how to avoid them or fully disclose, obtain informed consent, and manage them. • Understand the duty to report to CFP Board and the duty to cooperate. • Identify the Practice Standards when providing financial advice that requires financial planning. • Understand the duty to provide information to clients when providing financial planning and/or financial advice.