

2026 Church Plan Workshop

PRESENTED BY MCAFEE & TAFT

AGENDA

MONDAY APRIL 27, 2026

- 7:30–8:35am** *Check-In and Breakfast*
- 8:30–8:45am** **Welcome and Announcements**
- 8:45–9:15am** **What is a Church Plan and Why Does it Matter?**
- 9:15–10:00am** **403(b) Basics**
- 10:00–10:15am** *Morning Break*
- 10:15am–Noon** **403(b) Basics** *(cont'd)*
- Noon–1:30pm** **Lunch Break** *(Lunch Provided)*
- 1:30–2:50pm** **403(b) Basics** *(cont'd)*
- 2:50–3:00pm** *Afternoon Break*
- 3:00–3:25pm** **Practical Issues for Roth Catch-up Contributions**
- 3:25–3:45pm** **Trump Accounts**
- 3:45pm** *Primary Session Adjourns for the Day*
- 3:45–4:45pm** **Legal Ethics Discussion** *(for Attorneys)*
- 5:30–6:30pm** *Fellowship Reception*

TUESDAY APRIL 28, 2026

- 7:30–8:30am** *Breakfast*
- 8:30–10:15am** **Retirement Plan Potpourri**
- Regulatory Update
 - Litigation Update
- 10:15–10:30am** *Morning Break*

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TUESDAY APRIL 28, 2026 (CONT'D)

- 10:30–11:30am** **State Laws Impacting Self-Funded Church Health Plans**
- ▶ Anatomy of a State Insurance Law
 - ▶ Impact of the Church Plan Parity and Entanglement Prevention Act and State Exemptions
 - ▶ Strategies for Dealing with State Laws
- 11:30am–Noon** **Housing Allowance Issues**
- Noon** *Session Adjourns for the Day*

WEDNESDAY APRIL 29, 2026

- 7:30–8:30am** *Breakfast*
- 8:30–9:30am** **Church Alliance and Washington Update** – Karishma Page and Lauren Flynn, K&L Gates, and Chris Wells, Church Alliance
- 9:30–10:30am** **Health & Welfare Benefit Plan Update**
- ▶ Health & Welfare Plan Litigation Update
 - ▶ Service Provider Fee Considerations
- 10:15–10:30am** *Morning Break*
- 10:30–Noon** **Health & Welfare Benefit Plan Update (cont'd)**
- ▶ PBMs – Regulatory Update
 - ▶ HIPAA Update
 - Recent Enforcement
 - Regulatory Updates
 - ▶ Group Health Plan Compliance Reminders
- Noon** *Conclusion of Workshop*