



2025 Fiduciary Training Series, Part 3: Elevating Plan Design (Webinar Recording)

This is a strategic webinar recording designed for plan sponsors who seek to improve the value and performance of their retirement plans. This presentation highlights how thoughtful plan design can help drive key business objectives—including tax efficiency, employee retention, cost control, and regulatory compliance.

Topics covered include:

- The reasons plan design has been overlooked in recent years—and how to bring it back into focus.
- A five-step process to align plan features with organizational goals.
- Approaches for using flexible, modern plan documents to tailor benefits for different employee groups.
- Real-world examples and case studies that show how strategic design choices can improve outcomes for both the organization and its employees.

Whether you're aiming to simplify administration, attract top talent, or maximize contributions for key employees, this webinar recording offers actionable insights to help you design a plan that works for today and for the future.

Additional CAPTRUST Resources:

- [2025 Fiduciary Training Part 3: Elevating Plan Design Slide Deck](#)
- [2025 Fiduciary Training, Part 1: Best Practices for Plan Sponsors](#)
- [2025 Fiduciary Training Part 2: Effective Plan Governance](#)
- [The Importance of Fiduciary Training](#)
- For a copy of the transcript, [click here](#).

