



## Inside the Industry

### Episode 32

In a special edition of *Revamping Retirement*, [Jennifer Doss](#) hosts live from the [National Association of Plan Advisors](#) (NAPA) 401(k) Summit in Las Vegas, alongside [Phyllis Klein](#), senior director of Retirement Plan Services at CAPTRUST.

Joining our hosts are two of the industry's most prominent ERISA attorneys: [Fred Reish](#), partner in the Benefits & Executive Compensation practice group, the Investment Management group, and the Financial Services ERISA Team at Faegre Drinker; and [David Levine](#), principal and co-chair of the Plan Sponsor Practice at Groom Law Group.

Following our panel's robust conversation around current plan sponsor concerns, the latest areas of industry focus, and key takeaways from the NAPA conference, [Mike Webb](#) shares his take on the most common retirement plan loan taxation misconceptions in *Minute with Mike*.

---

#### Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable

---



**CAPTRUST**

but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors