Advanced Benefit Consulting

What It Means to Be an ERISA Plan Fiduciary: The Responsibilities and Potential Liability

Webinar Tuesday, September 22, 2026 | 10 am – 11:45 am

OFFERING 1.5 HOURS OF HRCI GENERAL CREDIT

Presenters: Marilyn A. Monahan, Monahan Law Office & Dorothy Cociu, Advanced Benefit Consulting

Under ERISA, those who manage employee benefit plans are fiduciaries. Understanding what it means to be a fiduciary, and what responsibilities a fiduciary has to plan participants, is a critical part of plan administration. This program will provide an overview of who qualifies as a fiduciary, what it means to be a fiduciary, and what actions fiduciaries should (and cannot) take. We will also cover the recent legislative and regulatory actions regarding fiduciaries, as well as potential liability of fiduciaries for actions they take. A discussion of tips, best practices, and resources will be included. In addition, we will discuss the US Department of Labor cybersecurity requirements for fiduciaries, and the CAA 2021 and CAA 2026 disclosure requirements and potential liability for insurance brokers, TPAs, and PBMs.

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