

SECURE Act 2.0: Reshaping the Retirement Landscape

Course Overview

The long-awaited and much anticipated "SECURE 2.0" is here. Join TRA and Retirement Learning Center as we provide an overview of the many aspects of the new retirement-related legislation known as SECURE 2.0. This bill makes significant changes to most aspects of the retirement environment including expanded contribution limits and credits, enhancements of SIMPLE IRA arrangements, emergency saving account options in 401(k), and matching of certain student loan payments. In addition, we'll cover changes to excesses, corrections, RMD and rollover rules. Lastly, the timing, amendment and effective dates of key provisions will be discussed.

Learning Objectives

- Understand the new 401(k) features including emergency savings accounts, student loan payments, starter 401(k)s, required auto-enrollment features and increased credits and limitations
- Identify enhanced SIMPLE-IRA features, modifications to 457(b) eligibility requirements and ability to treat employer contributions as Roth amounts
- Recognize expanded rollover options, additional distribution penalty exemptions, RMD changes
- Summarize changes to MEP/PEP and Group of Plans rules
- Consider the timing and effective dates of the provisions and requirement amendments

In order to be awarded the full credit hours, you must be present for the entire session, registering your attendance and departure in the webinar and answering all polling questions.

Participants will earn 1.0 CPE credit. Program is free.

Field of Study: Specialized Knowledge

Additional Information:

Prerequisites: 3-5 years experience in the industry

Who should attend: Financial Professionals and Accountants; others are welcome.

Advanced Preparations: None

Program Level: Intermediate

Delivery Method: Group Internet Based

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