

SECURE Act 2.0: Reshaping the Retirement Landscape

Course Overview

The long-awaited and much anticipated "SECURE 2.0" is here. 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

CE offered:

- "Investments & Wealth Institute® has accepted "SECURE 2.0: Reshaping the Retirement Landscape" for 1 hour of CE credit towards the CIMA®, CPWA®, CIMC®, and RMA® certifications."
- "CFP Board has accepted "SECURE 2.0: Reshaping the Retirement Landscape" for 1 hour of CE credit towards the CFP® designation."
- This program is valid for 1 PDCs toward SHRM-CP and SHRM-SCP recertification.
- Participants will earn 1.0 CPE credit. Program is free.

To receive CE credit, you must remain logged into the video portion of the webinar for the entire program, registering your attendance and departure in the webinar and answering all polling questions. Logging into the audio portion only is not sufficient for CE credit.

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

Refunds and Cancellations: For more information regarding refund, complaint and program cancellation policies, please contact our offices at 218-828-4872 or email

info@cecenterinc.com

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