

State-Sponsored Retirement Plans: An Overview

Course Overview

The largest portion of retirement income for retirees comes from workplace retirement plans. Yet, roughly 56 million individuals (35%) do not have access to retirement plans at their place of work. To address the lack of plan access head on and a mounting retirement income crisis, a growing number of states now require private-sector business owners without retirement plans adopt state-sponsored retirement plans for their workers.

During this webinar, we will discuss the history of state-sponsored retirement programs, which states have programs in place, those that will be launching in the near future, the features of each state plan and possible alternatives for employers in impacted states. Plus, we will discuss the provisions of SECURE Act 2.0 that affect state-sponsored retirement plans.

Learning Objectives

- Understand why state felt compelled to sponsor retirement plan programs for private-sector workers
- List the states that have implemented and launched a state program, and the states that are still in development
- Articulate the impact that SECURE Act 2.0 legislation has on the features of state-sponsored retirement plans
- Describe the types of plan alternatives that are available to employers in states with a mandate

CE offered:

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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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