

SECURE 2.0: Update, Amendments and Next Steps

Course Overview

This course is intended to support plan sponsors and their professional advisors by optimizing the plan amendment process to ensure the plan is crafted to support and enhance the organization's culture and ethos. The impending plan amendment process is the ideal opportunity to review the plan and make changes to it aligns more closely with the objectives of the organization.

The material overviews the new optional and required provisions and discusses what the amendment process entails including the timing and documentation requirements. Impending IRS and DOL initiatives are also explored along with potential implications for the plan sponsors.

Learning Objectives

- Provide plan sponsors the understanding necessary execute the plan amendment process.
- Offer an overview of the new provisions, the implications of these provisions and when such provisions should or should not be considered.
- Enable plan sponsors and their advisors to make effective decisions aligning plan provisions with organizational goals and objectives.
- Highlight impending IRS and DOL initiatives and apprise plan sponsors of the possible impact such guidance may have on their qualified plans.

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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