



5 Hot Topics Impacting Retirement Plans

Event

9.19.23

2:00 PM — 3:00 PM CST

Employers sponsoring 401(k) and other retirement plans have had their plates full as of late. And, thanks to the Secure 2.0 Act of 2022 and other legislation impacting retirement plans, more is added to that plate as we look ahead to 2024.

Join us for an hour-long seminar as we explore five hot topics impacting retirement plans, including:

- Optional plan design changes for retirement plans, including those for Roth matching and non-elective contributions, hardship distribution self-certifications, and retirement plan matches based on student loan payments.
- Mandatory plan design changes for retirement plans, including the hotly contested Roth catch-up contribution changes for employees making \$145,000 or more.
- Updates on where we stand with the impact of environmental, social & governance (ESG) rules on retirement plans.

Employers offering retirement plans should understand these new changes – whether optional or required – to ensure that their retirement plans stay compliant while supporting their employees' financial wellness and retirement security.

The firm will submit this program for HRCI and SHRM credit.

If you have any questions, please contact **Nikki Griffin**.

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