



Is Your Retirement Plan Due for a Check Up?

Event

10.22.25

12:00 PM — 1:00 PM CDT

Register for Webinar

If you offer a retirement plan to your employees, you have a fiduciary responsibility to ensure the plan is compliant with the latest regulations and acts in the best interest of participants – but that can be easier said than done. A fiduciary plan review can help identify strengths, uncover gaps, and provide actionable recommendations to help ensure a healthy retirement plan.

In this webinar, we examine:

- How to identify if your retirement plan is outdated or underperforming
- Red flags that suggest your fees, funds, or fiduciary process need attention
- How to compare your plan's design and costs to current industry benchmarks
- Steps to improve participant engagement, savings rates, and retirement readiness
- How to conduct a plan checkup that drives measurable improvements
- What to know heading into 2026 – from SECURE Act 2.0 changes to the OBBB – including compliance priorities, best practices, and how to stay ahead of evolving retirement plan legislation

The firm is submitting this webinar for HRCI/SHRM credit.

Presented by:

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If you have any questions, please contact **Stephani Harper**.

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