

L&E Seminar | What You Need to Know About Secure Act 2.0 of 2022

Posted in Event on April 7, 2023

Date: Tuesday, May 2, 2023

Location: Miller & Martin, 12th Floor Volunteer Building, 832 Georgia Avenue, Chattanooga, TN 37402

Time: Registration 4:00 p.m. | Program 4:15 p.m. – 5:15 p.m. | Networking Reception (*light refreshments to be served*) 5:15 p.m. – 5:45 p.m.

Organizing Attorney: Chris Crevasse (Member, Miller & Martin)

Guest Speakers: Tommy Horst (Co-Owner/President, ERISA Services, Inc.) and Tiffany Horst (Shareholder/Director of Business Development, ERISA Services, Inc.)

Parking*: Metered parking is available on Patten Parkway or the parking lot adjacent to the Volunteer Building at the corner of Lindsay Street and MLK Blvd.

**Complimentary Parking is only available for the parking lot at the corner of Lindsay Street and MLK Blvd. Miller & Martin can only validate parking for those who provide license plate info ahead of time when registering or directly to the Volunteer Building parking attendant on Lindsay Street before parking in the lot.*

Join us for an afternoon seminar followed by a reception with light refreshments. RSVP below.

Course Description:

The SECURE 2.0 Act of 2022 makes many significant changes to the rules governing retirement plans – rules that employers, plan participants, and plan administrators need to know!

Join us for a discussion of the legal and practical implications of the SECURE 2.0 Act, including:

1. New automatic enrollment and automatic escalation requirements.
2. Incentives for employers to establish retirement plans.
3. Changes to minimum distribution requirements.
4. New participation opportunities for long-term part-time workers.
5. New Roth contribution opportunities – and requirements.
6. New emergency withdrawal and emergency savings provisions.
7. Charitable contribution opportunities.
8. Plan administration challenges and opportunities.