



Decoding the Secure Act 2.0

Start Date: 5/8/2024 8:00 AM

End Date: 5/8/2024 10:30 AM

Decoding the Secure Act 2.0

Sunny Ramirez, CHSA - Sage Ruttly & Company

Wednesday, May 8th 2024

8:00am - 10:30am

Location:

United Way of Greater Rochester and the Finger Lakes

75 College Avenue

Rochester, NY 14607

A better understanding of the Secure Act as it relates to the following:

Opportunity for payments towards student loans-not all record keepers can do so at this time.

Emergency funds; from the employer side. What makes them applicable to the employer?

Required minimum distributions for 401K

Changes from 2023

What's to come in 2024

By the end of this session, the attendee will :

Understanding the intricacies of what is out there regarding the Secure Act and whether it makes sense for the employee base. What could this mean for your company?

What the mandatory changes were for 2023

Better understanding of changes for 2024 and in the future. what is on the horizon for 2024.