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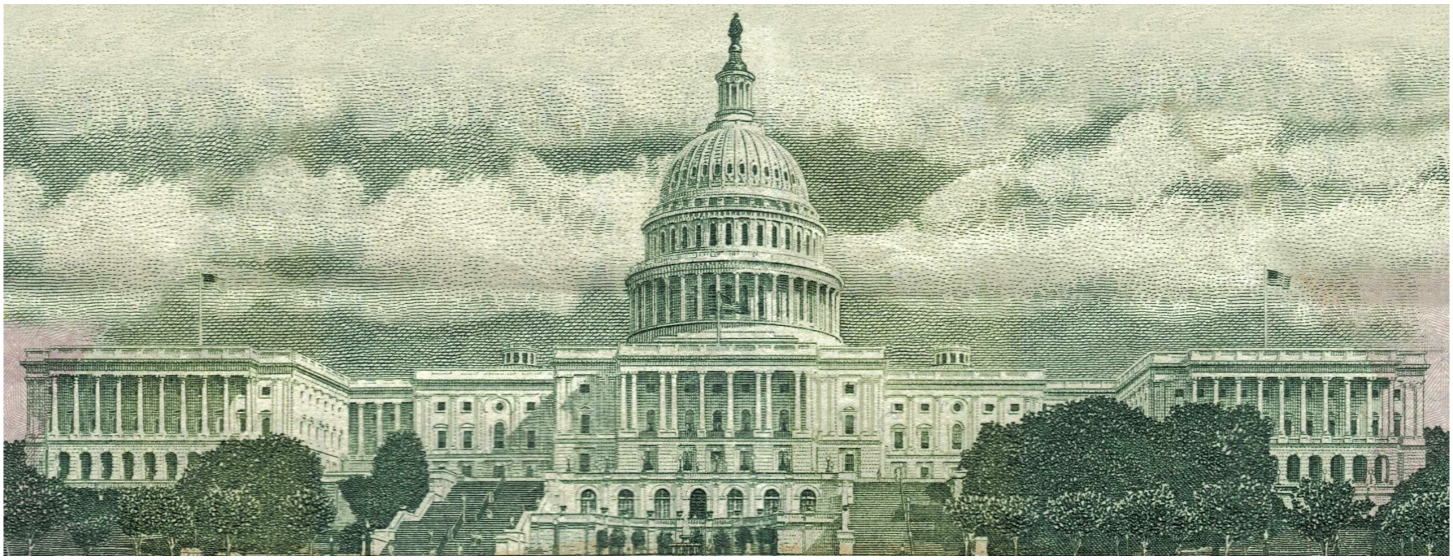

Anticipating SECURE 2.0 Changes (Webinar Recording)

As retirement plan sponsors and their recordkeepers prepare to integrate applicable provisions, common questions are arising. Some relate to the details of Roth provisions, emergency savings accounts, and student loan repayments. Others ask about recordkeeper differences and how to understand participant needs.

In this webinar recording, CAPTRUST retirement plan practice leaders will review some frequently asked questions they are hearing from plan sponsors across the country and offer potential guidance and best practices for moving forward. Watch the recording and learn:

- When key provisions will become available, and which are required vs. optional
- Which provisions are getting the most attention in the industry
- Which provisions need the most guidance to move forward
- How to talk to your recordkeeper about your needs
- Best practices for participant communication

Personality Meets Plan Compliance

Episode 20 of Revamping Retirement dives into the dynamic world of retirement plans with special guest Ary Rosenbaum—an ERISA attorney known just as much for his Mets memorabilia and ‘80s TV nostalgia as for his legal acumen. Host Mike Webb talks with Ary about how he built a career around humanizing retirement plan law through platforms like That 401(k) Site, That 401(k) Conference, and That 401(k) Podcast.

Humor, Hook, and Human Connection

Ary explains how injecting humor and pop culture into serious topics like plan compliance isn't just a gimmick—it's a way to connect with real people. From wrestling references to Caddyshack callbacks, he uses storytelling to cut through the complexity of legalese and help plan sponsors feel more engaged, not more confused. This isn't just about entertainment—it's about clarity, trust, and keeping retirement planning from becoming white noise.

Big Issues, Simple Language

The episode also touches on pressing policy developments, including the Department of Labor's rush to release rules before the next election and the ongoing back-and-forth over fiduciary standards, ESG funds, and private equity in retirement plans. Ary offers grounded takes on what matters most to plan sponsors—and which proposals might not survive political transitions.

Whether you're a plan sponsor, advisor, or just a fan of old-school baseball jerseys, this episode is a reminder that compliance doesn't have to be dry. It can even be a little fun.

To download a copy of the transcript, click here.

Additional Resource

Anticipating SECURE 2.0 Changes (Webinar Recording) Slides

SECURE 2.0 Timeline

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