



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](#)

Legal Notice



This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2025 CAPTRUST Financial Advisors