CAPTRUST

Episode 48: Breaking Down SECURE 2.0 Act

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On this month's episode of *Revamping Retirement*, Jennifer Doss and Scott Matheson are joined by Dawn McPherson, CAPTRUST's director of retirement plan consulting. Listen as the team breaks down SECURE 2.0 Act, which passed at the end of 2022, including their favorite—and not so favorite—provisions of the legislation and potential benefits to participants. Jennifer and Dawn discuss the new required minimum distribution (RMD) age, student loan repayment options, the IRS correction program, the paper statement requirement, and more.

Also in this episode, CAPTRUST Senior Financial Advisor Mike Webb sheds light on common misconceptions about excess deferrals for plan sponsors.

To close the show, Scott introduces CAPTRUST Director of Endowments and Foundations Heather Shanahan, who will be hosting the firm's new podcast series, *Mission + Markets*. Focusing on endowments and foundations, this new podcast will explore an array of topics from board turnover to RFP best practices, launching with CAPTRUST's 2022 Endowments and Foundations survey results.

Additional Resources

SECURE 2.0 Act Passes | Retirement Plans | CAPTRUST

SECURE 2.0 Wealth Brief | Wealth Management | CAPTRUST