



## Episode 56: Holistic Financial Wellness with Kimley-Horn

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In this month's episode of *Revamping Retirement*, [Jennifer Doss](#) talks with Kimberly Plessinger and David McEntee from [Kimley-Horn](#). They discuss the company's financial wellness initiatives, including benefits and retirement plans.

Kimley-Horn places a strong emphasis on financial wellness, especially for its younger employees, providing educational resources and support to help employees understand the importance of saving for retirement and making informed financial decisions.

The discussion then shifts to focus on the company's transition to 3(38) discretionary services for retirement plan management. This transition helped reduce fees for plan participants while maintaining a collaborative relationship with CAPTRUST.

In *Minute with Mike*, Mike Webb covers the two-year delay in the implementation of the new mandatory Roth age-50 catch-up rule under SECURE Act 2.0.

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### Resources:

Last month's episode: [Participant First with SUNY](#)



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