

SECURE 2.0 Act of 2022: A Ten-Year Guide to Tax Planning Self-Study Webinar (1.5 Hours)

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Self Study Webcast
Dec 20 - Dec 21

Overview:

On December 29, 2022, President Biden signed into law the SECURE 2.0 Act of 2022 as a part of the larger federal funding omnibus bill. This legislation builds upon the original SECURE Act (Setting Every Community Up for Retirement Enhancement) that was signed into law by President Trump in late 2019, and, as did the original SECURE Act, aims to further strengthen the American retirement system. During this new program, you will learn about the additions and enhancements made to the original SECURE Act, including:

- Further updates to the Required Minimum Distributions (RMD) age
- Additional changes to certain RMDs
- Potential increases for catch-up contributions
- Changes that involve student loan payments, disaster relief, and emergency savings

Objective:

To ensure that all tax professionals are quickly brought up to speed in regards to the additions and enhancements made to the SECURE Act and how it will impact the way in which their clients continue to prepare for their retirement. Many potential retirees will see additional aspects of flexibility that this updated Act provides and will want to learn how it impacts them for their short term and long term plans.

[Detailed Learning Objectives](#) [1]

Emphasis:

- Adjustments to the RMD age
- Changes to RMD penalties and to certain Roth RMDs
- Increases in catch-up contributions
- Opportunities for student loan payment matching
- Automated disaster relief
- Changes in eligibility for part-time employees' contributions to 401(k) plans
- Automatic enrollment and automatic plan portability
- Potential additions to emergency savings
- Impact on 529 plans
- Replacing the pre-Act nonrefundable Saver's Credit

¹Through the automatic enrollment rule, eligible plans to automatically enroll new employees in employer 401(k) and 408(a) plans within the required time frame.

²Under the automatic RMD rule, eligible plans to automatically enroll new employees in employer 401(k) and 408(a) plans within the required time frame.

³Under the automatic enrollment rule, eligible plans to automatically enroll new employees in employer 401(k) and 408(a) plans within the required time frame.

⁴Under the automatic enrollment rule, eligible plans to automatically enroll new employees in employer 401(k) and 408(a) plans within the required time frame.

⁵Under the automatic enrollment rule, eligible plans to automatically enroll new employees in employer 401(k) and 408(a) plans within the required time frame.



BottomPrerequisite:
None.

Preparation:
No advance preparation required.

Level of Knowledge:
Overview.

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Links:
[1] [https://www.cpeonline.com/JavaScript:showObjectivesPopup\(\);](https://www.cpeonline.com/JavaScript:showObjectivesPopup();)