WAKE FOREST UNIVERSITY

HARDYREED

Tax Exempt & Governmental Retirement Plan Executive Education Training

Come join us – January 23-26, 2023

At Wake Forest University in Charlotte or Virtually

For Best Practices of Managing Public Employee Retirement Plans

We've got a terrific opportunity for you. Whether you work with a **403(b), 457(b), 401(a)** or other type of retirement plan, there are changes in rules, compliance, and fiduciary best practices to be aware of. While you may not be a plan fiduciary, the responsibilities of offering and overseeing a plan continue to evolve.

Learning Objectives include:

- Understanding new rules for Tax Exempt, Governmental and Church DC Plans
- Recruiting, Rewarding and Retaining employees using "layering on the benefits"
- Understanding key elements in prudent selection of providers and investments
- Installing a sound governance structure to protect your organization
- Reviewing and understand protective compliance components
- Receiving insights on **SECURE 2.0** Act of 2022 affecting 403(b) and 457s and other DC Plans
- Examining Lifetime Income solutions and in-plan Annuities

The cost for this three-day training is $1,957 which includes **17 credits of continuing education**

Instructors/Faculty: Dr. MK Campion, Sue Diehl, Dr. Sean Hanna, Al Otto, Ken Parkinson & Don Trone

Please join us to network with other professionals and hear from experts in plan governance in the public and private retirement plan industry. Upon completion, you will receive **a Certificate in Applied Fiduciary Practices awarded by Wake Forest University and 17 CE credits.**

IRS-APPROVED CONTINUING EDUCATION PROVIDER
Pending approval for 17 hours of CE Penserv Plan Services, Inc. is an approved IRS CE provider

Learn More / Register

This should be behind learn more button…

The Best Practices of Managing Tax-exempt and Governmental Employer Retirement Plans

Choice: In-person or Virtual

January 23 - 26, 2023

Cost: $1957

Board certified fiduciaries Dr. MK Campion, Sue Diehl, Ken Parkinson, Don Trone, Dr. Sean Hannah, and Al Otto will share the best practices for retirement plan administration and management. Attendees will receive the knowledge necessary to address potential liabilities while improving their retirement plan's recruiting and retention impact.

AND…SECURE 2.0 is here!

On the last day of the program, we will cover the provisions of SECURE 2.0, some of which are applicable on the day of enactment!
Learn –

- New products that are available to Employers
- New penalty free withdrawals
- Emergency savings accounts under defined contribution plans
- Improvements to QLACs (Qualified Longevity Annuity Contracts)
- *Rothification has arrived!* – What's that? Includes Employer contributions that can be in the form of a Roth contribution!

For more information, please contact: MK Campion at campion@championcr.com or

(713) 446-0806

Please note that upon submission you'll be redirected to an optional, free fiduciary self-assessment.