FREE VIRTUAL CLE

This program examines essential changes from the original and current SECURE Act 2.0. We will discuss how these changes affect retirement and employer-sponsored retirement plans.

SIDEBAR ADVISORS

THE SECURE ACT 2.0: WHAT YOU NEED TO KNOW

APPROVED FOR 1.2 NJ, 1.0 NY CLE CREDITS (APPROVED JURISDICTION POLICY)

HOSTED BY: NIRAJ CHHABRA, MBA, CFP®, CLTC®, FINANCIAL ADVISOR WITH SIDEBAR ADVISORS, LLC

SPEAKER

NIRAJ CHHABRA, CFP®,MBA,CLTC,CRPC®

FINANCIAL PLANNER AT SIDEBAR ADVISORS

GUEST SPEAKER

ASHA PAULOSE, ESQ.

LAW OFFICE OF ASHA PAULOSE

ELDER LAW & ESTATE PLANNING

WEDNESDAY, APRIL 12TH AT NOON EST

PLEASE RSVP WITH RYLIE AT RYLIE.WICOFF@SIDEBARADVISORS.COM

EVENTS

This CLE Covers:

- New RMD rules and contribution limits for retirement plans
- Impact of the 10-year rule on estate planning
- New estate planning opportunities
- Companies can make 401(k) matching contributions to Roth 401ks
- Rolling unused 529 balances to a Roth IRA
- Qualified charitable distribution limit increased