

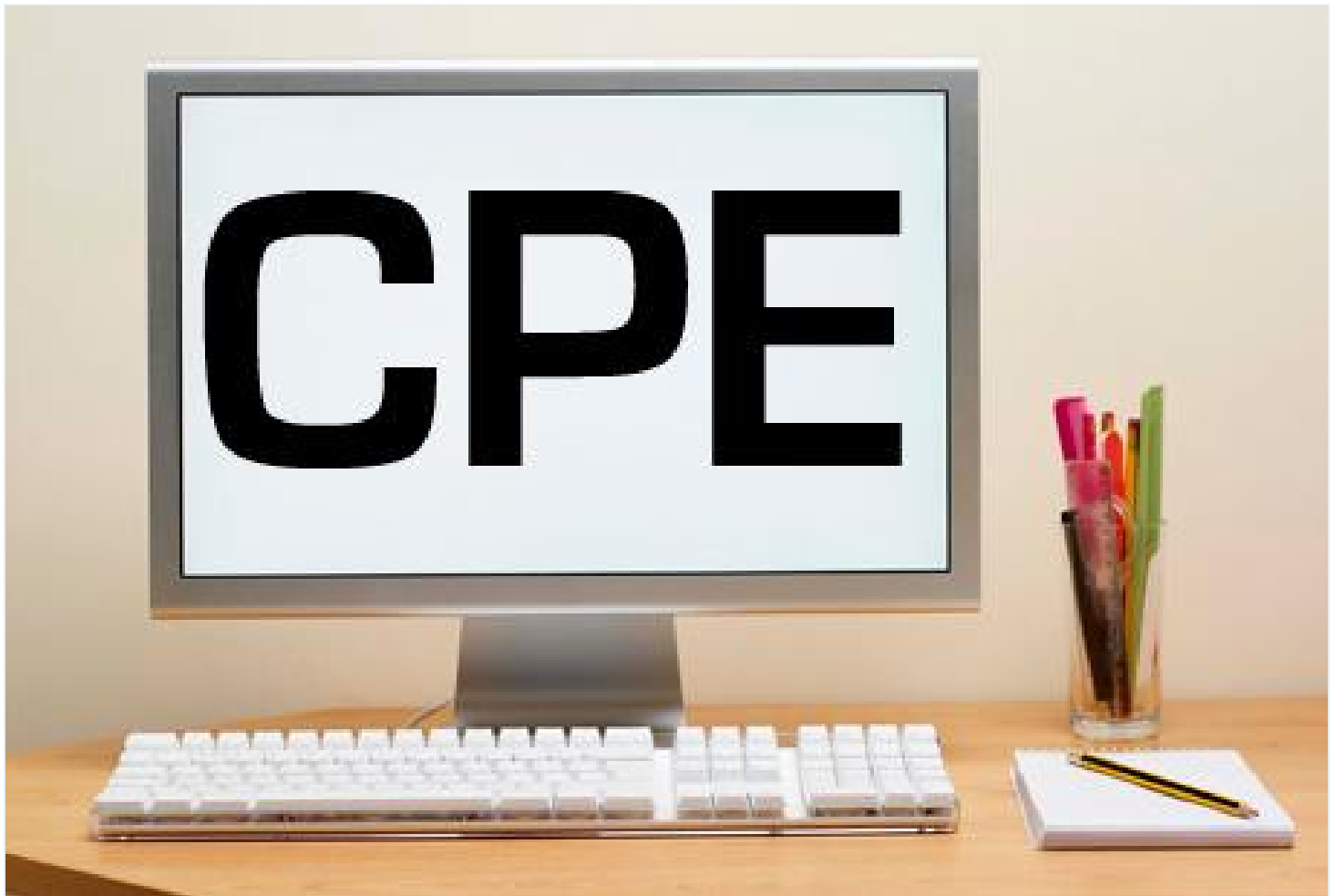
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Spending Bill: The SECURE 2.0 Act of 2022

Airing live on Tuesday, Dec. 27, with subsequent rebroadcast dates that week and into January, Introduction to SECURE 2.0 Act of 2022 (SEC2) will provide a deep dive into ...

Isaac M. O'Bannon • Dec. 26, 2022



[Surgent Accounting & Financial Education](#), a division of KnowFully Learning Group, today announced a new online continuing professional education (CPE) course that

covers the SECURE 2.0 Act of 2022 and associated changes to IRAs and qualified

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system ushered in by the 2019 SECURE Act, is to expand retirement coverage and increase retirement savings. As such, it has many important changes relating to IRAs and qualified plans. This long-awaited legislation alters the landscape of retirement planning for taxpayers of all ages, and there are changes taking immediate effect in January 2023.

“At Surgent, we make it a priority to educate the accounting and finance community about legislative changes as they occur, and we are excited to dig deep into the SECURE 2.0 Act early next week,” said Nick Spoltore, Surgent’s vice president of strategic content development. “This course will give practitioners a thorough understanding of the latest rules on retirement, allowing them to competently discuss the changes with their accounting and finance clients. The webinar is also of particular relevance to practitioners’ own retirement planning.”

Major topics to be covered in the course include:

- Automatic enrollment requirements for 401(k) plans
- Change in the credit for small employer pension plan startup costs
- \$2,000 saver’s match
- Withdrawals for emergency expenses
- Higher catch-up limits to apply beginning at age 60
- Increase in age for required beginning date for mandatory distributions
- Coverage for part-time workers
- Student loan payments as elective deferrals for purposes of matching contributions

- Financial incentives for plan contributions

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- Dec. 28, 2 – 4 p.m.
- Dec. 29, 11 a.m. – 1 p.m.
- Dec. 30, 1 – 3 p.m.
- Dec. 31, 11 a.m. – 1 p.m.
- Jan. 3, 2 – 4 p.m.
- Jan. 6, 1 – 3 p.m.

In addition to this CPE webinar, Surgent is also updating its 2023 curriculum to reflect these changes that will soon go into effect.

The two-hour course is worth two CPE credits. Learn more about and register for the new webinar [here](#).

Accounting • Firm Management

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