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effective retirement planning.

May. 01, 2023

The logo for Drake Software, featuring the word "Drake" in a dark grey sans-serif font and "Software" in a light blue sans-serif font, with a registered trademark symbol (®) at the end.

The SECURE 2.0 Act of 2022 addresses issues lawmakers believe are roadblocks to effective retirement planning. Building on reforms in the Setting Every Community Up for Retirement Enhancement Act of 2019, this legislation expands retirement coverage and makes retirement plans easier to navigate.

While containing provisions concerning a wide range of issues, financial professionals who serve tax clients need to know the tax implications of this legislation. SECURE 2.0 provides new incentives for employers and workers to participate in retirement plans, from enhancing credits and reducing restrictions to simplifying rules and lowering penalties.

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