Episode 49: SECURE 2.0: A Recordkeeperâ€™s Perspective

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In this month's episode of *Revamping Retirement,* Jennifer Doss and Scott Matheson are joined by Vanguard Senior ERISA Consultant Janet Luxton to unpack SECURE 2.0 from a recordkeeper's perspective. The three look at what is required to implement versus what is optional in the legislation, as well as a seemingly simple question: What should you focus on first? From required minimum distributions (RMDs) to emergency savings accounts, Janet provides an interesting viewpoint on the new ruling.

Also in this episode, CAPTRUST Senior Financial Advisor Mike Webb kicks off his SECURE Act Series going over 403(b)s and CITs.

Additional Resources

Revamping Retirement Podcast | Episode 48: Breaking Down SECURE 2.0â€¦ (captrust.com)

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