



May your holidays be merry and the year ahead be bright!  
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#### **IRS Updates Mortality Tables for Calculation of RMDs**

The agency says the purpose of the updates is to allow retirees to retain more savings in their accounts in case they live longer. [Read more>](#)

#### **DOL Releases Updated Versions of Form 5500**

The agency has also highlighted important modifications to the form. [Read more>](#)

#### **Office of the Chief Actuary Updates Actuarial Valuations of OASDI for 2020**

The Social Security Administration (SSA) has announced that the Office of the Chief Actuary has updated the actuarial valuation of the combined Old Age and Survivors Insurance (OASI) and Disability Insurance (DI) trust funds. [Read more>](#)

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#### **Q3: 401(k) Participants, Self-Directed 401(k) Balance Growth Hold Steady**

Heading into the fourth quarter, there are both encouraging signs and cause for caution. Undeterred by the COVID-19 economic downturn, Americans overwhelmingly continued saving for retirement through defined contribution plans during the first three quarters of 2020—and markets have been walking a fine line, according to two recent studies. [Read more>](#)

#### **The TDF performance mosaic: Piecing together the full story**

Assessing whether a target-date fund (TDF) series is performing as expected can be a difficult undertaking. Each TDF series features multiple vintages, each with its own asset allocation. [Read more from the Vanguard Blog>](#)

#### **2021 U.S. Market Outlook: Better Days?**

As we are soon to say a not-so-fond farewell, or good riddance, to 2020, it's time to look ahead to 2021 and what we all hope is a better year. [Read more>](#)

### Year-End Compliance Update for Retirement Plans

As 2020 draws to a close, this is a good time for employers sponsoring retirement plans to wrap up year-end compliance issues and prepare for the upcoming year. Here is a quick list of topics that plan sponsors may want to consider as 2021 approaches. [Read more>](#)

### What's Behind 'SECURE 2.0' Provision to Boost RMD Age to 75?

Age for retirement account required minimum distributions, raised to 72 this year by SECURE Act, could increase another three years if new retirement reform bill passes. [Read more>](#)

### COVID-19 Impact on Retirement Plans, Nov. 2020

PSCA conducted a snapshot survey of plan sponsors in November as a followup to June and April, to determine what additional changes they have made regarding the Coronavirus Aid, Relief, and Economic Security (CARES) Act and the ongoing COVID-19 pandemic. [Read more>](#)



### Newsorthy Notes

**We are happy to announce the following organizational growth:**

**Norm Yamamoto**, Actuarial Services, **Marc Condon**, Pension Administration Services, and **Pamela Minish**, Investment Advisory Group managing director, have been named vice presidents and shareholders of the firm. [Read full press release>](#)

**Valerie Cardona** has rejoined the firm's H&H Service Center as an analyst, and **Caitlyn Doyle** has joined the Pension Administration Team as administrative assistant.

### We are pleased to support the following:

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