



The SECURE Act has garnered a lot of attention recently since being signed into law on December 20, 2019. To keep our clients informed as to how this may affect their organization's retirement plans, we hosted a webinar detailing key points of the new legislation. The webinar replay is now available. **Get webinar>**

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#### 'INFORM Act' Seeks Pension Lump-Sum Buyout Transparency

The bill would require an explanation of how a lump sum was calculated—including the interest rate, mortality assumptions and whether any additional plan benefits were included in the lump sum, such as early retirement subsidies. **Read more>**

#### PBGC Materials Updated Per Final Rule

The Pension Benefit Guaranty Corporation (PBGC) has announced that it has updated most of the forms, instructions and modules of PBGC's e-filing portal affected by the Miscellaneous Corrections, Clarifications, and Improvements Final Rule. The Office of Management and Budget (OMB) has approved them and they are now available for use. **Read more>**

#### IRS Issues 2020 Cumulative List for Pre-Approved DB Plans

The IRS has issued Notice 2020-14, which sets forth the 2020 Cumulative List of Changes in Plan Qualification Requirements for Pre-Approved Defined Benefit Plans (2020 Cumulative List). **Read more>**

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#### Investment Advisory Group Named to PlanAdviser's Top 100 List

For the 5th year in a row, we are pleased to announce our Investment Advisory Group has been named as one of *PlanAdviser's 2020 Top 100 Retirement Plan Advisers*. We were the only firm in Connecticut to win in the small team category. **See complete list>**

planadviser's 2020  
**TOP100**  
RETIREMENT PLAN ADVISERS

#### COVID-19 and Market Volatility

A great deal of market uncertainty exists as investors cope with the effects of the Coronavirus (COVID-19) on the global economy. We are taking this issue very seriously, and our investment advisory leaders have produced a brief video providing you with market insights at this time. **Watch video>**

**Webinar - 6 Tips for Coping with Market Volatility**

Given recent news, it's more important than ever to not let emotions take over your decisions. Learn what steps to take to help navigate a volatile market. [Register here>](#)

#### **401k Plan Sponsors Fiduciary Duty in Light of Coronavirus Fear**

You can't escape it. It's all over the news. Every headline screams of it. Every story twists its way to mention it. You can be certain every 401k retirement saver is thinking about it, fearing what their next statement will reveal.

[Read more>](#)



#### **DC Plan Sponsors Increasingly Embrace Auto-Escalation as Default Option**

Ten years ago, many DC plan sponsors that offered escalation features required participants to opt in, but that appears to be changing, according to a new survey. [Read more>](#)

#### **Digital Design Influences Retirement Plan Participation and Savings Rates**

Digital design has an impact on more than just the data that is being presented. Enhancing the digital design of a retirement plan digital enrollment interface improves voluntary enrollment and contribution rates, according to new research cited in Harvard Business Review. [Read more>](#)

#### **SECURE Act Impact: 3% Reduction in Retirement Deficit?**

Key provisions of the SECURE Act could reduce the U.S. retirement deficit by 3% or \$115 billion for households between 35-64, according to a new study by the Employee Benefit Research Institute (EBRI). [Read more>](#)



#### **News-worthy Notes**

**We are pleased to support these upcoming events:**

The Town of Middletown Mayor's Charity Ball

The Ferguson Library's 'A Novel Affair'

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