



The Association of Colorado Independent Schools and Mutual of America

Present

RETIREMENT PLANS: What to know about The Secure Act 2.0, Fiduciary Oversight of Plan Sponsors (Schools), and the Colorado Secure Savings Program

WHEN: Tuesday, April 18, 2023 10:00 am – 11:00 am

WHERE: Remote via Zoom- Invitation will be sent prior to Webinar

AUDIENCE: School Heads, HR, Business Managers

About the Webinar

The Secure Act 2.0, Fiduciary Oversight of Plan Sponsors (Schools), and the Colorado Secure Savings Program

This Retirement Plan Session will focus on The Secure Act 2.0, Fiduciary Oversight of Plan Sponsors (Schools), and the Colorado Secure Savings Program. We will focus on four areas of the Secure Act 2.0—coverage and participation, contributions, distributions, and plan administration. Within each area, Scot will explore key provisions and explain how these will or may impact how Schools run their plans going forward. We will then transition over and address the ever growing Fiduciary duty that is placed on retirement plan sponsors. Lastly, we will explore State Law and the impact that the Colorado Secure Savings Program has on Colorado business.

About the Presenter

Scot McMorris



Scot McMorris, Vice President, joined Mutual of America Financial Group in 2004 and has responsibility over the Denver Regional Office and Salt Lake City Branch Office. He has

completed FINRA Series 6, Series 26 and Series 63 requirements. Mr. McMorris and his staff oversee all aspects of Defined Contribution Plans which include 401(k), 403(b), and 401(a) Plans. Delivering comprehensive services to clients that cover Administration/Compliance, Fiduciary Services / Investment Oversight, and Participant Engagement are three primary areas of importance.

**For more information, contact ACIS at (303) 444-2201 or www.acischools.org
Please register online at www.acischools.org**