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FREE CE ELIGIBLE LIVE WEBINAR

Practical and Tactical Actions for Small Business Owners

12 - 1 PM CT
WEDNESDAY | JUNE 11

Course Overview

SECURE Act 2.0 gives small business owners exciting new tactics and strategies designed to help them achieve business goals as well as retirement savings objectives for themselves and their employees. Attend this seminar to learn how to use qualified retirement plans and executive compensation arrangements to increase retirement income security. The session will also cover new retirement plan design options and enhanced tax credits available as a result of law changes, plus learn how implementing a plan governance process can help mitigate fiduciary liability.

Learning Objectives

1. Use retirement plans to achieve business goals.
2. Understand key provisions of SECURE Acts 1.0 and 2.0 affecting retirement plans.
3. Learn the elements of a plan governance process.
4. Identify popular executive compensation arrangements.
5. Consider financial wellness programs for employees.

CE Offered:

In order to be awarded the full credit hours, you must be present for the entire session, registering your attendance and departure in the webinar and answering all polling questions.

- ▶ Participants will earn 1.0 CPE credit. Program is free.
- ▶ Investments & Wealth Institute® has accepted "Practical and Tactical Actions for Small Business Owners" for 1 hour of CE credit towards the CIMA®, CPWA®, CIMC®,and RMA® certifications.
- ▶ CFP Board has accepted "Practical and Tactical Actions for Small Business Owners" for 1 hour of CE credit towards the CFP® designation.
- ▶ This program is valid for 1 PDCs toward SHRM-CP and SHRM-SCP recertification.

Field of Study: Specialized Knowledge
Additional Information:
Prerequisites: 3-5 years experience in the industry
Who should attend: Financial Professionals and Accountants; others are welcome.
Advanced Preparations: None
Program Level: Intermediate
Delivery Method: Group Internet Based
Refunds and Cancellations: For more information regarding refund, complaint and program cancellation policies, please contact our offices at 218-828-4872 or email info@cecenterinc.com

RSVP

For in-person attendance, please RSVP to the financial advisor who invited you.

To register to attend **ONLINE ONLY**, scan the QR Code with your smartphone or click on the PDF image to link to the GoTo Webinar registration page.

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