

LUNCH & LEARN: SECURE ACT 2.0

Rethinking Retirement Investments & Estate Planning for 2023 and Beyond

Congress recently passed a new bill called the SECURE Act 2.0. Please join us to learn how this bill will affect your investments and overall retirement plan.

We will cover:

- New Distribution Rates
- New Accumulation Rules
- Revised Roth Rules
- Qualified Charitable Distribution
- Inheritance and Tax Planning
- More Highlights



Educational Workshop Details

Date: Sunday, June 11th

Location:

*Old Zionsville UCC
5981 Fountain Road
Zionsville, PA 18092*

Post Worship Lunch:

12:15pm – 12:45pm

Educational Workshop:

12:45pm – 1:30pm

Hosted by Oaktree Advisors

Oaktree Advisors is an independent, family-owned, registered investment advisory firm. Our goal is to help clients have a greater sense of confidence around their financial future and avoid the pitfalls so many people make before and during retirement.

Presenters

*Paul Eichman, CFP®, Principal
Ben Eichman, CFP®, Financial Advisor*

**TO REGISTER, PLEASE CONTACT US AT 610-882-5670 or
GO TO <https://www.oaktree-online.com/events>.**



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