Dear Friends,

Below please find the latest issue of *Retirement Times*. Our goal is to provide you with timely and relevant information each month that you can use in running your business.

If we can be of any help or service to you, or if you would like to discuss any parts of this newsletter with us, please feel free to reach out. Thank you as always for your confidence.

Best regards,

Victor

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Monthly News and Updates for Retirement Plan Sponsors and Fiduciaries

The Retirement Times is FINRA-reviewed and covers a variety of ERISA-related topics. We also provide a monthly FINRA-reviewed participant memo written in an easy-to-understand manner for your clients to send to their employees.

IN THIS MONTH'S ISSUE

Your Plan Fiduciary Must-Do and Should-Do Lists

Here are some tasks to remember that you *must* do and some related things to consider whether you *could* do as a plan fiduciary and the reasons we think they are worth considering.
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A More Nuanced 4% Rule?

In December 2022, Morningstar adjusted its recommended starting annual withdrawal rate for balanced retirement portfolios upward from 3.3% to 3.8%.\
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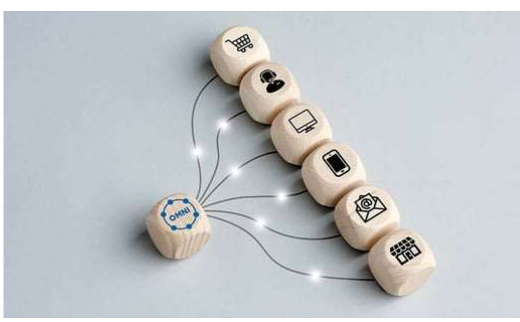

Benefits of Omnichannel Financial Wellness

An effective omnichannel strategy can help plan sponsors engage more employees, regardless of their level of investing experience or financial literacy.
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Participant Corner: Need a Tax Break?

You may be eligible for a valuable incentive, which could reduce your federal income tax liability, for contributing to your company's 401(k) or 403(b) plan.
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To remove yourself from this list, or to add a colleague, please email us at info@levywealth.com or call 215-875-8720.

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