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,

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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

Customized Content is Good Medicine for Retirement Readiness

From recent college grads struggling with student debt to seasoned professionals planning an imminent retirement, participants' financial goals are as diverse as the workforce they're part of.

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Closing the Auto-escalation Gap

High participation rates don't always translate to high deferral rates. According to the 2022 Callan Defined Contributions Trend Survey, three-quarters of DC plans offer auto-enrollment, while only two-thirds provide an auto-escalation feature.

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The Six Types of Fiduciaries in Retirement Plans You Need to Know

A retirement plan may have one or more fiduciaries who have distinct responsibilities, though many individuals and committees may serve in multiple fiduciary roles.

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Participant Corner: How Much is Enough?

While thinking seriously about retirement finances is useful, for most people, these retirement formulas may not come close to what your retirement actually looks like.

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