

401(k) Focus

WHAT'S NEW

RPS leaders discuss SECURE 2.0

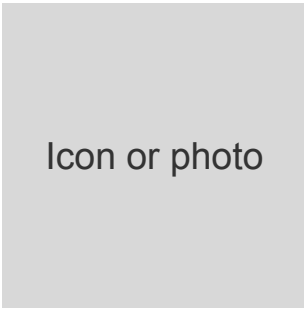
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[Watch the webcast](#)

WASHINGTON UPDATE

What's new: Fall fiscal showdown

See what's at stake in what is expected to be a tense congressional session this fall in [our latest article](#) series that follows legislative and regulatory affairs.



MEET THE TEAM



ERISA Consulting team

- See how your plan compares across your industry
- Attract and retain talent through prospective plan changes
- Ensure compliance with testing and regulations
- Navigate corporate transactions
- Complement 401(k) plan with other benefits

[Contact the ERISA Consulting team](#)

SUPPORTING PARTICIPANTS

Estate planning resources

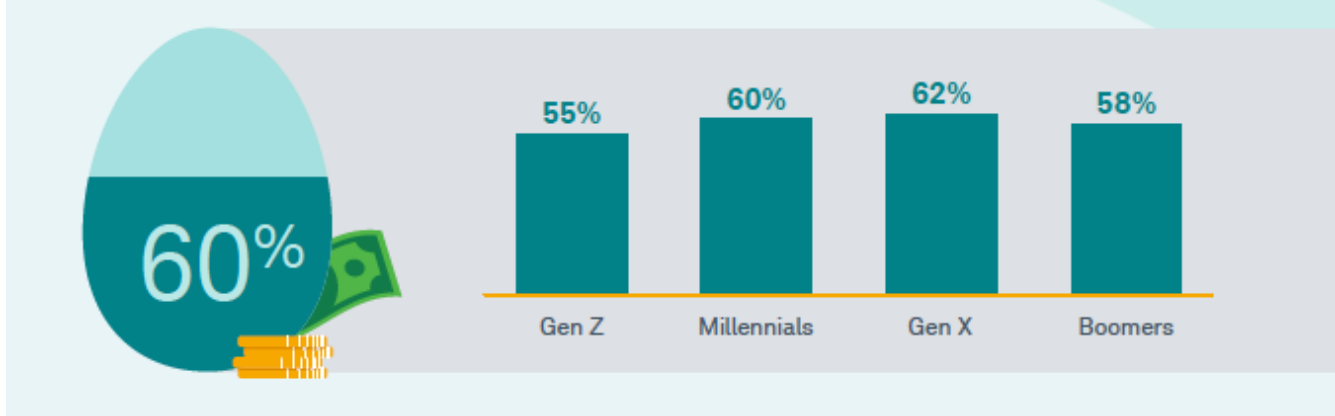
Equip your employees with everything they need to plan for an estate with our resources, including:

- An estate planning checklist
- Advice for how to choose an attorney
- Tips for how to avoid estate taxes
- Help putting an estate plan into action



[View our employee estate planning resources](#)

IN CASE YOU MISSED IT



View our latest participant insights

Stay informed about the retirement landscape from the eyes of your employees—and your prospective employees. Our newly released 2023 Participant Study offers crucial insights into employees' attitudes and behaviors around retirement.

[View the full results](#)

DATES TO KNOW

Event Title: <city, state>
<date>

[Weblink](#)

Connect with us on [LinkedIn](#)

Retirement Insights

 THE LATEST

Icon or photo

SECURE 2.0 webcast recap

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Watch the webcast [»](#)



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MEET THE TEAM



ERISA Consulting Managing Director
Dennis Wiley

Active in the retirement industry since 1994, Dennis has been leading Schwab's ERISA Services team since 1999. With a deep understanding of ERISA and DOL regulations, Dennis provides expertise that helps sponsors like you manage the intricacies of each plan—from defined benefit and defined contribution plans to nonqualified plans that fall outside of ERISA.

[Contact the ERISA Consulting team ›](#)



EMPLOYEE SUPPORT

Estate planning 101

Equip your employees with everything they need to plan for an estate with our resources, including:

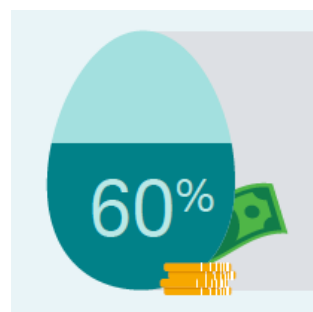
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ON YOUR CALENDAR

Major 401(k) adoption deadlines

October 1, 2023 - Deadline to adopt a safe harbor 401(k) plan for 2023.

December 2, 2023 - Deadline to adopt the amendment necessary to convert a normal 401(k) plan to a 3%.

March 15, 2024 - Deadline for S-Corps and partnerships to adopt a normal 401(k) plan for 2023.

April 15, 2024 - Deadline for C-Corps and sole proprietorships to adopt a normal 401(k) plan for 2023.

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