

Publications

2020 brings new opportunities in the retirement space

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2020 brings with it a host of new opportunities for investment advisers and consultants working with retirement plans and individuals saving for retirement. Compliance with Form CRS will create new branding opportunities. The SECURE Act's "pooled employer plans" provision will create a new market for investment advisory services. Additionally the elimination of "stretch IRAs" will create a need for more innovative one-on-one financial planning. Whatever the market segment you work with, it is important to understand the changes that will impact your business this year.

To read the full *InvestmentNews* article, click [here](#).