

The Planners Cornerstones

Secure Act signed into Law!

On Friday, December 20, the SECURE Act (officially titled the Setting Every Community Up for Retirement Enhancement Act) was signed into law.

How Will This Legislation Affect Individuals and Retirement Plan Sponsors?

The SECURE Act will:

- **Modify the required minimum distribution (RMD) rules for designated beneficiary accounts.**
- **Expand qualified tuition expenses under Section 529 of the Internal Revenue Code.**
- **Allow open multiple employer plans (MEPs).**
- **Allow long-term, part-time employees to participate in the retirement plan.**
- **Raise the age for RMDs from 70½ to 72.**

For additional information see our
Facebook Page

A Note from Eric's Office:

Happy New Year.... The beginning of a new decade

We hope you all had a safe New Year's Eve celebration with the ones you love. Here are a few highlights for the upcoming year:

- Super Bowl Party
- Workshops
- Habitat for Humanity building event
- Hot Rods 4 Hearts Car Show
- Build two Give one (Build-a-bear event for kids 12 and under)

Spring Events

February 2 – Hey Football Fans!: Come join us cheer on the NFC and the AFC in the Super Bowl at Bair's Sports Grill in the Parkcrest Center at 3821 S Campbell Ave. Kick-off is at 5:30pm CST.

February 15 – Springfield Detective Day: Think you have what it takes to catch a killer? The exciting outdoor detective game that's just like a giant version of the board-game Cluedo. Starts @ 10:00 am. Email Vicki if you would like to be on a team.

March 24 – April 5: Eric and Vicki will be out of town on vacation. Wish him luck, he will be the skipper on a catamaran with Vicki's two sisters and brother-in-laws.

April 20 – "What's Next" Workshop: Come join us 7pm – 9pm at the Springfield Public Library on S Campbell for an evening filled with guest speakers on what to expect, how to handle, resources and assistance, with our aging parent(s).



Eric K Peterson,
CFP® Practitioner



Ed Adams
Financial Planning
Assistant



Vicki Portincaso
Exec. Asst. / Marketing



Brooke Portincaso
Receptionist

"Investing with Integrity"™