



**Business
Owner
Advisors
COLLAB**

TUES | AUG 15

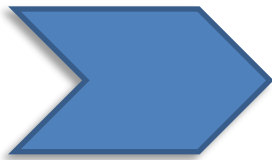
7:30 to 9:00 AM

The University Club
150 E Central Blvd
Orlando, FL 32801

Business Owners Breakfast

What to Know About Secure Act 2.0

STAY COMPETITIVE + SAVE TAX



COMPETE

Talent War Continues

Workplace retirement plans are just as important for employee retention as a competitive salary & flexible work arrangements.* Ensure your plan (powered by new tax credits) can attract and retain top talent.



UNDERSTAND

Mandates vs Optional

Benefit from our straight-forward summary of the Act's 90+ provisions. Learn what mandates are required by when and eligibility for valuable tax credits.



TIMING

Ideally Before 4Q 2023

Discover how to take full advantage of tax credits available for the next three (3) and/or five (5) years based on retirement plan design and eligibility.

* Voya Financial, October 2022 Survey

YOUR HOSTS - BUSINESS OWNER ADVISORS COLLAB

Heatherann Antonacci, Vistage Florida | Teri Benson, Pando Partners Wealth Management of Raymond James | Tom Daly, Sales Xceleration
Doug Foreman, Fringe Benefit Plans | Dan King, Close Reach Consulting | Sean Murphy, South State Bank | David Poparad, CPA, Poparad Advisors

Please Register via **EVENTBRITE** by Friday, 8/11/2023