Right-size? Build confidence? Ramp up savings? Retirement considerations for each generation in 2021 [1]

Catherine Golladay shares a few ideas on steps each generation can take to help keep their retirement savings on track.

Industry Trends and Updates

SDBA Indicators report
Get the latest compilation of key investment statistics and profile information on employees investing in the Schwab Personal Retirement Account® [2] (PCRA).

Looking for a way to invest according to your values?
Investors today can choose a wide variety of social issues to support—from clean technology to racial equity to gender diversity and more.

Rules for Retaining Benefit Plan Records [1]
Electronic filing is popular, but benefit plan sponsors need to know the rules about what documents can be stored digitally and how.

Regulatory and Legislative

Washington Update
Read the latest legislative and regulatory news, as summarized by Michael Townsend, Vice President for Legislative and Regulatory Affairs, Charles Schwab & Co., Inc. In this January update, Michael provides perspective and outlook for the retirement savings sector in 2021.

Plan document restatement process is beginning
The IRS requires pre-approved retirement plan documents to be updated every six years. Over the next 18 months, we will be working through the restatement process with our clients currently on a Schwab Retirement Plan Services pre-approved plan document.

This will be an ongoing process, so if you have multiple clients with us, they will not be able to be restated all at once. When it's time for each restatement, we'll provide drafts and outline clear decision points to help plan sponsors each step of the way.

Corporate News

Introducing Trends within the Plan Health Dashboard
Plan sponsors now have even more data at their fingertips within the Plan Health Dashboard through Trends. Go beyond the point-in-time information with up to three years of month-end data around a subset of available plan metrics.

Trends illustrate the impact of markets, key events, plan provision changes and new offerings for any plans using the Plan Health Dashboard. Recent Trends data, for example, shows that during the pandemic, Schwab Retirement Plan Services participants continued to save for their retirement.

Coming Soon

Video: Hear Phyllis Klein, Senior Director of Retirement Services, CAPTRUST Financial Advisors and Taylor Garlesky, Managing Director, Consultant Services, Schwab Retirement Plan Services discuss how retirement plan participants can continue to save during uncertain times, and how sponsors may want to think about their plans, especially in terms of advice and managed accounts.

2021 Executive Series for Consultants (virtual)
Speakers: Catherine Golladay, Brian Bender, Nathan Voris, Taylor Garlesky
Registration opening soon.

Industry Events and Education

Upcoming webcasts

2021

Schwab Market Talk Webcast Series: Our experts address your market & economic questions
Speakers: Liz Ann Sonders, Kathy Jones and Jeffrey Kleintop
Tuesday, February 9 11:00 am ET
Register

On Demand

What's Next? Charting the course for the retirement market
Register and watch

Cybersecurity and Data Protection
Register and watch

Conferences

PLANSPONSOR National Conference, 6/7 – 6/10, virtual
Learn more [1]

NAPA 401(k) Summit, 9/12 – 9/14, Las Vegas
Learn more [1]

Taylor Garlesky

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“We” and “our” refers to Schwab Retirement Plan Services, Inc.

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