

## Continuing Education Course Syllabus

**Course Number:** CE151

**Course Name:** Navigating the SECURE Act

**Prerequisites:** None

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### Course Description

This course offers a comprehensive overview of the major changes to the tax code for the upcoming year. Students will explore new contribution limits, detailed summaries of the latest tax amendments, and their significant impact on distributions. The course also provides critical insights into how these changes will affect clients, equipping students with the knowledge to navigate and advise on tax-related matters effectively.

### Learning Objectives

Upon successful completion of this course, you will confidently be able to:

- Interpret what the IRS RMD rules mean for beneficiaries,
- Identify and discuss SECURE Act planning strategies, and
- Describe the three kinds of retirement plan beneficiaries for determining post-death payouts.

### About the Experts

Ed Slott and Company is the nation's leading source of accurate, timely IRA expertise and analysis to financial advisors, institutions, consumers, and media across the country. Combined, Ed Slott's team of IRA experts possess over 70 years of experience in retirement education and in the facilitation of strategies to navigate the complexities of IRAs to financial advisors, CPAs, attorneys, insurance agents, and more.

Their mission is to educate financial professionals on an individual and corporate level to become knowledgeable, recognized leaders in the retirement marketplace; and to provide solutions to the most critical dilemmas and continually deliver practical, applicable, and easy-to-understand information on IRA, retirement, tax, and financial planning topics.



*\*Individual bios for each of the experts are located inside the classroom.*

## Course Outline

Review	Download	Complete
Course Presentation	2025 Retirement Plan Contribution Limits (Green Chart) 2025 Tax Planning (Orange Chart) SECURE Act Retirement Plan Payouts to Beneficiaries (Gold Chart) Single Lifetime Table Expanded Uniform Lifetime Table for Spouse Beneficiaries (Teal Chart) SECURE 2.0 Key Effective Dates Syllabus Course Manual Expert Bios	Final Course Assessment

## Evaluation Procedures

The final course assessment consists of a multiple-choice quiz that will assess a learner’s knowledge of the topics explored in the course. Learners must earn a score of 70% or better to complete the course successfully and earn continuing education credit.

## Course Policies

This self-paced continuing education course is delivered on The American College of Financial Service’s Knowledge Offerings learning management system. Learners may work at their own pace, but are expected to review all course content, complete all course activities, and abide by all policies and procedures of The American College of Financial Services, located at <https://www.theamericancollege.edu/about-the-college/the-college-at-a-glance>.

## Technical Support

If you encounter any technical difficulties within the platform, please access the support link and issue a support ticket to our helpdesk. For other questions, contact the Institute for Learning Innovation by email: [Innovation@theamericancollege.edu](mailto:Innovation@theamericancollege.edu).