



STAFF REPORT

MEETING DATE: 2/20/2026

Staff Report No. 26-130

SECURE 2.0 info and optional provisions decisions.

Staff Contact:

Chris Andrichak, Chief Financial Officer

Presenters:

Jake O'Shaughnessy, CFA, Managing Director, SageView Advisory Group

Lisa Braun-Ward, Sr Relationship Manager Mid-Market Tax Exempt, Empower