

# IRS Required Amendments

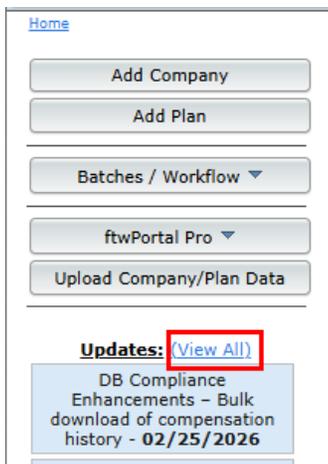
03/17/2026 3:02 pm CDT

**IRS Required Amendments** - are updates mandated by the IRS to ensure compliance with current regulations. Our pre-approved documents will include a tack-on amendment, while any new documents generated after the release of an IRS required amendment in the software will contain an Addendum reflecting these changes.

For details on preparing an IRS required amendment, please refer to the specific amendment announcement email sent to you. The email contains essential details, including deadlines, required actions, and links to FAQs.

All communications are stored within the software. To locate archived emails:

1. Log in to your account.
2. From the Home page, click the "View All" link under Updates. The next page will display all emails and updates sent to customers.



3. To narrow your search, you can type in key words (e.g. SECURE 2.0) in field above Subject.

The screenshot shows a search results table with a search filter "SECURE 2.0" applied. The table has columns for "Subject", "Type", "Date", and "Content". Two results are shown:

Subject	Type	Date	Content
SECURE 2.0 Termination Amendment for DB and DC plans Terminating in 2026	Email	2026-02-09	[Search icon]
2025 SECURE 2.0 Amendment Now Available for 401(k), Governmental 401(a), and Defined Benefit Plans	Email	2025-12-18	[Search icon]

4. Press enter on keyboard. The list will update to show only related communications.

**NOTE:** To open links within the communication, right-click on the link. From the menu, select whether you want to open the file in a new tab, a new window, or download it, depending your browser settings.

