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March 2026

ACTION ITEMS

- Register for the Quarterly Administration Meetings with Voya
- Register for the Annual Retirement Plan Conference on April 14
- Explore and Share the New SBA 401(k) Participant Microsite
- Encourage Participants to Register for SageView Education Webinars

QUARTERLY ADMINISTRATION MEETINGS

First Meeting is Today!

Be sure to register for our Quarterly Administrator Meetings with Voya. These informative calls offer the chance to hear from Voya with administrative updates and allow you to ask questions directly to our representatives.



Register for Q1: March 18 at 10am EST

Register for Q2: June 17 at 10am EST

Register for Q3: September 16 at 10am EST

Register for Q4: December 9 at 10am EST

ANNUAL RETIREMENT PLAN CONFERENCE - APRIL 14

Join us on Tuesday, April 14 for the annual Retirement Plan Conference at the VBA office, with the option to attend in person or virtually.



This year's agenda will include:

- Financial Market Updates
- Investment Fund Trends
- Plan Litigation and Fiduciary Liability
- Cybersecurity Updates
- SBA 401(k) Plan Utilization, and Benchmarking

In one session, Hartford/MIT AgeLab will present "8,000 Days," a program highlighting how longer lifespans create a retirement phase that can span 20+ years—about 8,000 days—and the new challenges and opportunities that come with it. The session will explore how we can help employees prepare for the challenges and opportunities in this stage. In person attendees may earn one hour of SHRM credit.

Register for the Conference: April 14 at 10am EST

NEW SBA 401(k) PARTICIPANT MICROSITE

Voya has launched a new microsite for all SBA 401(k) Plan participants. It provides consolidated tools and resources from Voya and SageView and will be updated regularly.

Please share the flyer with employees and consider posting it on your bank's intranet or onsite bulletin boards.



SBA / Voya Microsite Flyer

QUARTERLY EDUCATION WEBINARS

First Meeting is Next Week!



SageView (Patrick Abelon) will host quarterly participant webinars throughout 2026 (see the links in the Voya flyer below).

Two sessions will be offered at 5:00 p.m. to support participants who prefer after hours learning. All webinars will be recorded and made available afterwards.

We have aligned our Health & Welfare wellness themes with our retirement education topics as outlined below.

Quarter	2026 H&W Themes	2026 Retirement Themes	Why This Matters
Q1	New Year, New You	New Year, New Possibilities	Motivated reset period makes employees receptive to goal-setting.
Q2	Mental Health Matters	Feeling Secure About Your Finances	Lowering financial stress directly supports better mental health.
Q3	Love Your Heart	Love Your Future	Heart-healthy habits parallel long-term financial planning habits.
Q4	Prioritizing Preventive Screenings	Prioritizing Retirement Readiness	Preventive care mirrors preventive financial planning.

Register for Quarterly Webinars: [SBA / Voya Microsite Flyer](#)

SAVER'S TAX CREDIT

The Saver's Tax Credit is a federal tax credit available to employees who make eligible contributions to their 401(k) Plan. As explained in the attached SageView flyer (and your 401(k) Plan's Summary Plan Description (SPD)), the credit is designed to encourage low and moderate income employees to save for retirement through an IRA or 401(k) Plan.



The amount of the Saver's Credit depends on an employee's adjusted gross income (AGI), tax filing status, and the amount contributed to the 401(k) Plan. Based on AGI limits, eligible employees may receive a credit equal to 50%, 20%, or 10% of their elective deferrals.

Please feel free to share this with your employees.

[SageView Flyer](#)

QUESTIONS?

Please reach out to the [Benefits Team](#) at any time!



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