



CapitalROCK: Retirement Security Rule Review by Wagner Law Group

December 13, 2023 05:00 ET | Source: [CapitalRock LLC](#)

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Release Summary

With the announcement of the proposed Retirement Security Rule CapitalROCK requested the opinion of ERISA law firm, The Wagner Law Group, for evaluation.

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SALT LAKE CITY, Dec. 13, 2023 (GLOBE NEWSWIRE) --

CapitalROCK, the makers of RightBRIDGE Systems, has worked with the Wagner Law Group for legal opinions on DOL related matters for several years. With the recent announcement of the proposed Retirement Security Rule, CapitalROCK requested that the Wagner Law Group review the proposed Retirement Security Rule and provide an initial assessment of the readiness of the RightBRIDGE application for the new requirements of the Retirement Security Rule.

Stephen P. Wilkes, Chief Legal Officer of the Wagner Law Group, performed the review and CapitalROCK is pleased to share a portion of his white paper here:

“... we have reviewed the proposed Retirement Security Rule with an eye towards any changes that might impact the issues addressed in our opinion letters of July 13, 2021 and March 18, 2022. Of course, the proposed Retirement Security Rule and the proposed changes to PTE 2020-02 are just that – proposed – and their requirements may change in their final

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Group. The Wagner Law Group is considered to be the nation's preeminent ERISA and Employee Benefits law firm and CapitalROCK is pleased to share the relevant legal opinions, memos, and whitepapers with its customers and prospective customers.

This white paper can be requested at

<https://capitalrock.com/retirement-security-rule-white-paper/>

About CapitalROCK: CapitalROCK, the makers of RightBRIDGE, provides financial services firms with a powerful and configurable rules engine to determine and document the suitability or best interest status of proposed rollovers, account types, and products.

Many of the country's largest Independent, Bank, and Insurance broker-dealers rely on RightBRIDGE systems to help them meet their compliance and documentation obligations for regulations like Reg BI, Reg 187 and the DOL's PTE 2020-02.

Each RightBRIDGE deployment is configured for the licensing broker-dealer's specific products, policies, and compliance requirements. Each analysis is accompanied by CapitalROCK's exclusive ReasonText™. ReasonText™ is automatically generated, client and recommendation specific text that documents why or why not a proposed action meets the licensing broker-dealer's best interest requirements.

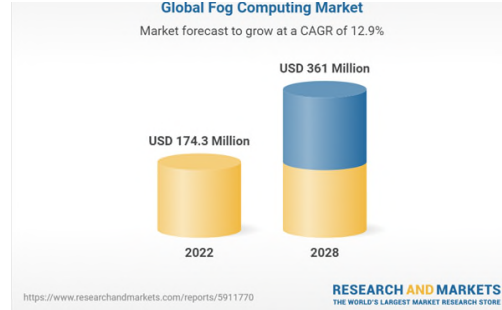
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