Resources for Employee Benefits Professionals

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Aspen Publishers

Wolters Kluwer Law & Business offers a full array of resources designed to meet the demands of busy Employee Benefits professionals. Whether you need quick answers to commonly asked questions or expert guidance on more advanced topics, we have the right resource to fit the size, scope and complexity of your organization.

Electronic Research Materials

CCH® Pension eLibrary on IntelliConnect™

Effortless, searchable access to all your electronic research materials

Customize your online research with the CCH Pension eLibrary, and you'll also leverage Wolters Kluwer Law & Business expertise to accurately and quickly answer any of your client questions. At its most basic level, the CCH Pension eLibrary includes the Pension Plan Guide explanations, newsletter and daily document updates, in addition to a plethora of primary source materials. It includes Pension Tracker, a customized daily e-mail news and information service, and Pension and Benefits NetNews, delivering timely news summaries with hyperlinked text. If you choose, you can augment this offering by selecting from a variety of CCH titles or Aspen treatises. More detail on these titles is included below.

CCH® Pension Plan Guide

Your complete, core guide to creating and managing a pension plan, from beginning to end

Access the resource with everything you need to set up, revise, terminate and manage a pension plan, day to day. The CCH Pension Plan Guide covers the rules affecting retirement benefit plans, delivering expert analysis and explanation of the law, as well as key cases, rulings and legislative developments. The Guide provides the full text of the Employee Retirement Income Security Act of 1974 (ERISA), plus ERISA regulations and Committee Reports. Rulings and releases from the IRS, PBGC, DOL, SEC and other federal agencies are also included. Also included are:

- Benefit-related court decisions from the U.S. Supreme, Appellate and Federal District Courts, the U.S. Tax Court and state courts
- The Internal Revenue Code and IRS regulations with selected Committee Reports
- Pension-related IRS and DOL regulatory preambles dating back to 1975
- IRS letter rulings and DOL and PBGC Opinion letters
- Class prohibited transaction exemptions
- Pending and final pension legislation
- The IRS Employee Plans Examination Guidelines Handbook
- EBSA Enforcement Manual
- IRS actuarial guidelines

Pension Tracker™

Daily news that's fully customizable

Pension Tracker delivers daily industry updates and alerts, from plan type to plan administration. You choose from a wide variety of document types and industry-specific topics—such as court decisions, DOL news and IRS regulations—and Tracker continues to monitor and report any related news as it develops. Each Tracker report also provides links to the full text of related stories and/or legal documents. Have the news and updates e-mailed to you. Plus you can select Tracker options that will alert you to anything that goes up in a Daily Document Update. Tracker is FREE with an Internet subscription to the Pension Plan Guide.

NetNews™

Weekly news summaries, linked to full text

Pension NetNews keeps you informed and aware of late-breaking pension and benefits developments by providing a summary of the news. Where applicable, hyperlinks within each issue will direct you to the full text of a law, or to other related information. Netnews is FREE with an Internet subscription to the Pension Plan Guide.

CCH® Compliance Guide for Plan Administrators

Expert help in complying with all reporting and disclosure requirements

The CCH Compliance Guide assists plan administrators in navigating the vast sea of rules necessary to maintain compliance status. It provides thorough explanation and analysis of plan reporting, disclosure, prohibited transactions, excise taxes, penalties, plan terminations and more. The Guide also covers every legal consideration as it relates to fiduciary rules, compliance regulations, termination procedures, plans subject to ERISA and retirement plans. It provides one resource with practical tools to help streamline administrative tasks, such as:

- Checklists to review compliance with reporting and disclosure requirements

- Tables, examples and practice tips
- Calendars to track reporting and filing deadlines
- Form 5500 and PBGC Premium Payment Form, along with other required forms and official publications issued by the IRS, DOL and PBGC
- Blank forms with instructions and various IRS Publications
- A newsletter providing industry news updates, legislative developments and important case rulings

CCH® Pension and Deferred Compensation Guide

A quick reference guide for establishing and administering all types of pension plans

Pairing practical, expert guidance with thorough references to Internal Revenue Code, ERISA, IRS and DOL rulings, the CCH Pension and Deferred Compensation Guide covers the essential tasks for creating and managing any type of pension plan. The Guide offers overviews of the many types of plans—including pensions, profit-sharing, 401(k), IRAs, 403(b) and more. It then explains the requirements necessary to establish and maintain a plan, including tax qualification. It reviews nonqualified plans and outlines the steps for terminating a plan. The Guide provides necessary IRS, DOL and PBGC forms, and also includes a monthly update highlighting new developments and rulings.

Executive Compensation

The basic framework for designing and drafting executive compensation programs

Executive Compensation is written by Michael S. Melbinger, a partner in the law firm of Winston & Strawn LLP, and global head of the firm's Executive Compensation and Employee Benefits Department. Executive Compensation examines and explains the law and market factors that impact all forms of executive compensation. It analyzes the many federal statutes, court decisions, state laws, accounting standards, stock exchange requirements, governmental regulations and market forces that govern the terms and provisions of compensation. Executive Compensation provides planning notes, comments, examples and other valuable tools—including sample legal agreements, checklists for various transactions, sample language and sample correspondence. When you purchase Executive Compensation, you will also receive Executive Compensation Update. This online quarterly newsletter keeps you abreast of all the latest information and analysis of executive compensation issues.

It also covers:

- Change in control agreements
- Consulting agreements
- Executive compensation in mergers and acquisitions
- Executive employment agreements
- Retention and compensation of outside board members

Practical Guide to 401(k) Plans

The answers and insights you need to manage 401(k) plans

The Practical Guide to 401(k) Plans is an electronic product designed to be your single source for updated, accurate information and thorough analysis. From a detailed discussion of regulatory and case law developments on a monthly basis to expert guidance and analysis by leading 401(k) practitioners, the Guide includes the facts and insights you need to manage these plans every day. A newsletter highlights and analyzes the most important developments in the field during the past month. Inside you'll find:

- Continually updated editorial explanations
- Sample charts, checklists, forms and plan documents
- Links to primary source materials

CCH® U.S. Master™ Pension Guide

The celebrated, year-round reference for all issues surrounding pensions and pension planning

Part of CCH's Master Series of professional guidebooks, the U.S. Master Pension Guide reflects the latest information, key legislation, regulations and rulings. The Guide covers everything you need to know about pensions, including rules on IRAs, 403(b) plans, 401(k) and nonqualified plans. It also provides a helpful topical index plus a quick facts card with at-a-glance pension-related facts and figures.

Electronic Research Materials

Aspen Treatises

Authored by recognized and trusted authorities in their respective fields, these Aspen references deliver a breadth and depth of expert, hands-on knowledge to help you create and manage pension plans from beginning to end. These invaluable references provide coverage of the full spectrum of topics from qualification requirements to taxation of distributions, from minimum distribution requirements to 401(k) plans.

The Pension Answer Book

Expert help navigating complex pension rules

Written by Stephen J. Krass, Aspen's Pension Answer Book provides to-the-point, expert answers to help you understand the many complex rules and regulations governing retirement plans. Delivering timely information on pension administration and compliance, the Answer Book helps you ensure compliance while maximizing tax advantages for employers and employees. Key areas covered include: qualification requirements; benefit and contribution limits; funding requirements; vesting; distribution; taxation; prohibited transactions–and much more.

Pension Distribution Answer Book

Legal, administrative and tax requirements for all types of distributions

Aspen's Pension Distribution Answer Book addresses the full range of requirements for all types of distributions—from in-service withdrawals to lump sums to direct rollovers. It presents the facts to solve a problem, answer a question, or make a decision. Authored by Melanie N. Aska, Scott D. Miller, and Carol R. Sears, the latest edition of the Answer Book provides fast, easy-to-understand explanations for interpreting statutes and regulations as well as complying with tax and reporting rules. It also features updated steps for avoiding plan disqualifications. Plus, it discusses current information on the voluntary correction programs under the EPCRS.

Plan Termination Answer Book

The correct procedures, start to finish, for terminating a plan

Aspen's Plan Termination Answer Book provides expert discussion and practical guidance on when and how to terminate a plan. It reviews which forms must be filed, how to correctly complete the forms and where to send them. Written by Ilene H. Ferenczy, the Answer Book guides you through potentially confusing issues such as the best process for terminating a plan through the IRS, Department of Labor or the Pension Benefit Guaranty Corporation. It then explains various requirements of the different governing agencies, along with qualification areas that must be addressed in a plan termination.

Journal of Pension Planning and Compliance

Timely legislative updates along with expert analysis and interpretations

Aspen's Journal of Pension Planning and Compliance brings you legislative news, critical pension and benefits issues, and key decisions and rulings by the federal courts, IRS, DOL and PBGC. It offers timely analysis of the issues, as well as workable solutions to complex problems you can put to use right away, including tips for avoiding those problems. The Journal delves deep beneath the surface to explore the complexities of a topic. Then it provides expert opinion and insights on the matter, including tax and legal strategies.

5500 Preparer's Manual

Complete guidance for your plan year filings

This definitive single-volume 5500 Preparer's Manual provides comprehensive coverage in an easy-to-use format for both pension benefits and welfare benefits plans. 5500 Preparer's Manual is the best resource available for preparing your 5500 filing confidently and correctly. Written by Janice M. Wegesin, 5500 Preparer's Manual provides comprehensive coverage in an easy-to-use format.

Highlights include: up-to-date, line-by-line explanations to prepare forms for filings; at-a-glance charts and examples covering key requirements, filing summaries, due dates, penalties, and more; step-by-step instructions for electronic signatures, transmission, accessing government software, and more.

Journal of Pension Benefits

Fresh insights and expert opinions on key pension issues

Created to offer pension professionals innovative ideas plus expert views on key topics, Aspen's Journal of Pension Benefits helps keep you up to date on the latest rules and regulations, as well as industry trends. It features regular contributions by some of the industry's most esteemed experts in the areas of:

- 401(k) investments and plans
- Fiduciary issues
- Legal developments
- Nonqualified plans
- Pension distributions and investments
- Pension plan compliance
- Plan administration and design
- Retirement plans for tax-exempt organizations
- Voluntary correction issues

Electronic Research Materials

Pension Benefits

The latest legal, regulatory, and industry developments affecting pension plans

Pension Benefits is a monthly pension industry review in digest format. Each issue focuses on cutting-edge trends and provides early warning of the issues that will affect pensions tomorrow. This newsletter is a unique business tool for monitoring reports from leading consulting firms and the top 250 pension periodicals. Pension Benefits is comprehensive in scope, reporting on every aspect of the ever-changing pension benefits field. As a subscriber, you're privy to the latest developments in 401(k) plans; Design and administration; Investments and funding; Legislation and regulation; Fiduciary obligations; ESOPs; ERISA; and more.

ERISA Law Answer Book

Clear and authoritative answers to questions related to ERISA compliance requirements as well as to the interpretation of ERISA and Internal Revenue Code sections and regulations.

Aspen's ERISA Law Answer Book is designed to help employee benefit administrators and their advisors identify practices that are likely to result in litigation and show them how to avoid exposing themselves to it. It is valuable guide for both plaintiffs and defendants in identifying arguments that support their respective positions in litigation. The book contains case law decisions, discussion of legislative and regulatory developments, practice pointers, and an extensive table of cases.

ERISA Fiduciary Answer Book

Key advice for managing ERISA fiduciary responsibilities safely and effectively

Aspen's online ERISA Fiduciary Answer Book is a comprehensive reference to Title I of ERISA for consultants, plan administrators, accountants, attorneys, and employee benefit plan fiduciaries. It offers detailed commentary on government regulations and curt rulings that continue to refine the duties of fiduciaries and the scope of their responsibilities.

Handbook on ERISA Litigation

An essential resource for any ERISA specialist or general Practitioner litigating ERISA cases or resolving them out of court.

Handbook on ERISA Litigation provides comprehensive and timely analysis of the statutes, current case law, procedural rules, and issues that can arise in ERISA litigation. The Handbook contains tables comparing rulings on issues by jurisdiction, checklists, and forms, as well as hundreds of citations to federal and state cases. Every major claim area under ERISA is covered:

- Fiduciary liability
- Violation of ERISA reporting and notification requirements
- ERISA discrimination claims and related statutory claims
- Plan termination claims
- Overfunded and underfunded plans

Insider's Guide to DOL Audits

A unique resource filled with practical tips

This online-only resource provides expert guidance on avoiding—or surviving—a Department of Labor audit of your plan. Areas covered include prohibited transactions, fiduciary duties, DOL enforcement projects, and civil and criminal enforcement processes. Written by a former DOL auditor.

401(k) Answer Book

Premier reference on 401(k)

Aspen's 401(k) Answer Book covers all aspects of 401(k) plan design and administration for pension plan administrators, human resources managers, fund managers, trustees, accountants, attorneys, consultants, financial advisors and anyone who must deal professionally with 401(k) plans.

401(k) Advisor

Stay informed of all the latest 401(k) information

401(k) Advisor keeps readers up to date with timely reporting and analysis of changes in 401(k) regulations and rulings. Combining the convenience and timeliness of a newsletter with incisive, original writing and special features keying in on areas of current concern, 401(k) Advisor provides straightforward coverage of technical issues in pension law and compliance; expert commentary on financial issues related to 401(k) plans; concise summaries of important court cases, IRS and DOL notices, new laws affecting 401(k) plans; and more.

Electronic Research Materials

457 Answer Book

The complete guide to eligible and ineligible 457 plans

Aspen's 457 Answer Book covers all aspects of eligible and ineligible 457 plans, including the dramatic changes made by the Pension Protection Act of 2006, Economic Growth and Tax Relief Reconciliation Act of 2001 (EGTRRA), and the Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010, and all subsequent guidance and rules. The Answer Book shows you how to determine the types of plans subject to Code Section 457. It also discusses eligibility requirements, contribution and deferral limits, as well as when to make unforeseeable emergency withdrawals and distributions.

403(b) Answer Book

The one place for expert answers to your 403(b) questions

403(b) Answer Book is the only professional reference that systematically answers hundreds of questions on 403(b) plans, plans of 501(c)(3) organizations, and church plans. In addition to full coverage of the final 403(b) regulations, 403(b) Answer Book provides coverage of taxation, ERISA and other regulations, plan administration, insurance and investment issues for each type of plan.

SIMPLE, SEP, and SARSEP Answer Book

Clear explanations with proactive strategies for maximizing your plan's benefits

Aspen's SIMPLE, SEP, and SARSEP Answer Book delivers the most up-to-date coverage on establishing, operating and terminating a SIMPLE, SEP or SARSEP program. The Answer Book examines changes to the employer deduction and participant exclusion limit for contributions to SEP arrangements.

Electronic Research Materials

Coverage and Nondiscrimination Answer Book

An instruction manual, answer guide and legal reference tool all in one

Aspen's Coverage and Nondiscrimination Answer Book delivers expert explanation plus a complete overview of testing procedures regarding participation requirements [IRC §401 (a)(26)], coverage [(IRC §410)] and nondiscrimination [IRC §401 (a)(4)]. The Answer Book provides a guide to planning opportunities found in the Code sections and regulations. It also serves as a manual for benefits practitioners designing plans to suit different employee populations.

Individual Retirement Account Answer Book

Expert guidance on the full spectrum of individual retirement account plans

Aspen's Individual Retirement Account Answer Book is the resource practitioners rely on for comprehensive, authoritative coverage of traditional IRAs, Roth IRAs, SIMPLE IRAs, SEP IRAs, HSAs, and Coverdell Education Savings Accounts. Individual Retirement Account Answer Book provides detailed Q&As, plain-English explanations, real-world examples, calculations and worksheets, practice pointers, and much more!

Defined Benefit Answer Book

The up-to-date, complete reference on defined benefits

Aspen's Defined Benefit Answer Book examines every aspect of defined benefits, including actuarial, administrative and compliance tasks. The Answer Book explains recent legislative changes and developments affecting defined benefit plans. It provides a section on financial accounting standards, including details and SFAS worksheets. Plus it includes covered compensation tables, annuity purchase rates and turnover rates.

Governmental Plans Answer Book

Detailed coverage of governmental plan administration and compliance

Governmental Plans Answer Book takes the reader step-by-step through the various laws that regulate retirement plans of state and local governments, the majority of which are defined benefit plans. For those practitioners with private plan experience who wish to work with governmental plans, it compares the regulation of the two types of plans. The authors systematically answer hundreds of questions and provide an invaluable reference for investment advisors, plan administrators, attorneys, actuaries, and accountants.

Roth IRA Answer Book

Step-by-step guidance straight from top industry experts

Roth IRA Answer Book provides a tutorial on this subject for a wide variety of professional markets, including pension consultants, insurance agents, financial planners and investment advisors, plan administrators, attorneys, and accountants, as well as those institutions that promote, market, service, or provide technical support to retirement plans, products, and related services.

You will find in-depth coverage of all aspects of the administration and operation of a Roth IRA, as mandated by the Internal Revenue Code, Treasury regulations, and IRS notices and announcements.

Plan Correction Answer Book

Guidance for plan administrators, benefit consultants, and other pension professionals in the area of plan compliance

Aspen's Plan Correction Answer Book provides a detailed look at each of the remedial programs available to qualified plans since the IRS adopted Revenue Procedure 2008-50 The Answer Book offers practical guidance on handling cases in each program, an overview of the more common types of failures, and examples of corrections and remediation under the various programs. Individual chapters deal with requirements of SCP, the streamlined VCP, Audit Cap, correction principles under EPCRS, compliance fees and sanctions, 401(k) plan qualification failures, and ESOPs.

Cash Balance Plans Answer Book

The preeminent resource for guidance on cash balance plans

Written by experts Daniel Schwallie, Barbara Hogg, Eric Keener, and Paul Rangecroft of Aon Hewitt, Aspen's Cash Balance Plan Answer Book provides reliable answers to over 500 cash balance plan questions. It explains the fundamentals of cash balance plans and how and when to use them. It provides you with:

- Information you need to determine whether cash balance plans are right for your company or your clients
- Detailed explanations of exactly how cash balance plans work—and their pros and cons
- Clarification of how cash balance plans can be used with traditional retirement
- plans or 401(k) plans to benefit both plan sponsors and participants
- The answers you need to guide your company or clients through effectively implementing cash balance plans
- The Answer Book also includes planning tips, caution notes, explanations of the law, as well as practical examples

Executive Compensation Answer Book

The complete source for proven, practical executive compensation solutions

This informative resource adopts a straightforward, Q&A format, giving you the information necessary to design, implement and administer executive pay plans, including analysis of the new deferred compensation rules and the final regulations issued under Code Section 409A. Written by Bruce Overton and Susan E. Stoffer, the Answer Book explains how to:

- Attract and retain top executive talent
- Structure incentives for peak performance
- Maintain strict compliance with regulations

Nonqualified Deferred Compensation Answer Book

Accurate, up-to-date solutions to managing nonqualified plans

Aspen's Nonqualified Deferred Compensation Answer Book provides an invaluable resource to professionals who advise, plan, fund or administer nonqualified deferred compensation plans. Written by Barry K. Downey, Henry A. Smith III, and Michael P. Connors, this Answer Book explains and clarifies the challenging issues behind nonqualified deferred compensation.

Journal of Deferred Compensation

A complete update on the hot topics and rulings affecting deferred compensation plans

The online Aspen's Journal of Deferred Compensation helps you navigate the complex government rules that limit salaries and benefits for top employees. The Journal discusses regulations that could potentially expose your organization to additional tax liabilities. It provides compliance information vital for you to know in order to be able to attract and retain top executive talent. It reports on the hot topics of the day, including designing a supplemental medical benefits program, SEC rules and compensation disclosure, stock appreciation rights, fiduciary responsibilities of providers and much more. The Journal provides expert guidance within all areas of executive compensation plans—from design through administration and compliance, including:

- Elective deferral plans
- Exposure of deferred compensation funding
- Nonqualified plan arrangements
- Stock plans
- Latest developments on Capitol Hill, at the DOL and the IRS
- Up-and-coming trends in the benefits arena

Electronic Research Materials

Handbook on ERISA Litigation

Counsel clients more knowledgeably and litigate ERISA disputes more effectively

Handbook on ERISA Litigation cuts through complicated statutory provisions and tells you which ERISA claims are recognized by which courts and how to litigate them. Helpful litigation checklists and forms are provided on key aspects of ERISA litigation as well as hundreds of citations to leading federal and state cases. Every major claim area under ERISA is covered:

- Fiduciary liability
- Violation of ERISA reporting and notification requirements
- ERISA discrimination claims and related statutory claims
- Plan termination claims
- Overfunded and underfunded plans
- Tax litigation
- Claims by the U.S.

Qualified Domestic Relations Order Handbook

The premier QDRO reference for family law attorneys and retirement plan administrators

Widely recognized as the definitive work on the topic, Aspen's Qualified Domestic Relations Order Handbook, written by Gary A. Shulman, turns the most confusing QDRO issues into clear answers and step-by-step guidelines. Drawing on years of experience, Shulman steers you past the QDRO pitfalls with expert tips, drafting checklists, and even a special chapter on 29 areas of high liability risk. In this volume you'll find:

- 21 QDRO models for all types of plans and conditions
- Comprehensive model separation agreement language that you can incorporate directly into decrees to ensure that all of the QDRO issues are
- properly addressed
- Guidance on how to "revoke" a QDRO that has already been approved by the plan administrator
- Guidance on how to draft and administer child support QDROs
- Dozens of tips on how to detect potentially hazardous deficiencies in the "company model" QDRO
- Detailed instructions and models for dividing federal and state government plans

Qualified Domestic Relations Answer Book

Expert support with tough QDRO questions

Written by mark W. Dundee, Aspen's Qualified Domestic Relations Order Answer Book tackles the problems faced by administrators and benefits managers trying to draft correct domestic orders that adhere to the strict ERISA requirements. The Answer Book covers such critical topics as:

- Department of Labor Advisory Opinions
- Internal Revenue Service positions
- State law decisions affecting QDROs
- Effects of EGTRRA and the Sarbanes-Oxley Act
- Latest rulings from the federal court, including the U.S. Bankruptcy courts and the U.S. tax courts

ERISA: Comprehensive Guide

Comprehensive analysis of Titles I and IV of ERISA and ERISA changes—directly applicable to your daily practice

Aspen's ERISA: A Comprehensive Guide provides a thorough and authoritative analysis of the principal statutory provisions of the Employee Retirement Income Security Act of 1974 (ERISA) and the corresponding provisions of the Internal Revenue Code dealing with employee benefits.

Cited by the Supreme Court, ERISA: A Comprehensive Guide discusses and explains the multitude of regulations, rulings, and interpretations issued by the Department of the Treasury, the Internal Revenue Service, the Department of Labor, and the Pension Benefit Guaranty Corporation in explanation of ERISA, as well as the subsequent legislation amending or supplementing ERISA.

Dividing Pensions in Divorce

The definitive pension reference work for domestic relations attorneys

Dividing Pensions in Divorce: Negotiating and Drafting Safe Settlements with QDROs and Present Values has been thoroughly revised and restructured to offer a practical guide for attorneys engaged in negotiations, especially alternative dispute resolution. It also provides practical insights and strategies in the complicated field of present values and qualified domestic relations orders (QDROs). As attorneys learn more about the intricacies of ERISA retirement plans, they can better decide when to draft a QDRO and when to offset pension assets with other, non-pension assets. With its explanations of winning strategies for complying with even the most complex legal, regulatory, and legislative requirements, Dividing Pensions in Divorce is the definitive pension reference work for domestic relations attorneys.

Dividing Pensions in Divorce will help you to:

- Effectively negotiate with any attorneys who do not advocate the use of the traditional coverture formula in a QDRO for a defined benefit plan
- Trace the marital and separate property components of defined contribution plans with a new step-by-step guide used in hundreds of cases
- Reduce your malpractice exposure by utilizing our new model termination letter to be given to your clients at the close of each case
- Prepare appropriate QDROs for plan administrators that utilize a severed approach in their administration of separate interest QDROs
- Understand the subtle plan differences between the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS) through the use of a new Government Plan Summary table
- Draft proper defined contribution QDROs in cases where the participant has an outstanding plan loan
- Implement the new legislation for court orders dividing the Federal Thrift Savings Plan
- Consider the important effects of active management of a 401(k) Plan and how it impacts the marital status of investment gains and losses
- Understand the significant and perhaps costly implications of your client's failure to revoke pre-divorce beneficiary designations under his employer sponsored plans
- Determine reasonable tax reductions to 401(k)s and defined benefit preset values with an updated tax analysis chapter

Quick Reference to ERISA Compliance

Your blueprint for ERISA compliance

With Aspen's Quick Reference to ERISA Compliance, you can easily determine what you need to do to comply with all the ERISA rules and the many related IRS, DOL, and PBGC requirements. Full of instructive flowcharts and plain-English guidance, you get instant direction on the reports and disclosures needed for your plan. It also provides you with practical tools and sound advice on planning, record-keeping and scheduling advice, including:

- A comprehensive collection of sample documents, with advice on how to use them and which plans they cover
- Worksheets that provide step-by-step guidance to every aspect of ERISA compliance and reporting
- A compliance calendar that covers key deadlines IRS and PBGC reporting requirements
- Advice on ERISA rules regarding documentation, claims, bonding and trust requirement

For Those Who Prefer Desktop References

Pension and Employee Benefits Code ERISA Committee Reports

An easy-to-use compilation of pension and benefits-related legislative history

Pension and Employee Benefits Code ERISA Committee Reports contains selected committee reports relating to legislation affecting pensions and employee benefits enacted since the passage of ERISA. Convenient finding devices permit readers to search by Code section, by ERISA section, or by public law number to find the relevant legislative history. Quantity discounts are available.

Pension and Employee Benefits Code ERISA Regulations (2 vol.)

Complete, accurate coverage of the pension provisions and selected welfare benefit provisions found in the Internal Revenue Code and ERISA

Pension and Employee Benefits Code ERISA Regulations (Volumes 1 & 2) provides full, authoritative coverage of the pension and selected welfare benefit provisions found in the Internal Revenue Code. It includes ERISA and the associated regulatory authority.

Pension and Employee Benefits Code ERISA Regulations Including Preambles and Committee Reports (4 vol.)

Full coverage of law and regulations plus legislative committee reports and official IRS/DOL preambles

Pension and Employee Benefits Code ERISA Regulations (Volumes 1-4) provides an authoritative and comprehensive reference to the pension and selected welfare benefit provisions of the Internal Revenue Code as well as ERISA and associated regulatory authority. This four-volume set contains all the materials of the two-volume set. It also offers the official IRS and DOL preambles to the final and temporary regulations housed in Volume 3 and legislative committee reports contained in Volume 4. The official preambles add important explanatory material that enhances understanding of the regulations, while the committee reports provide relevant legislative history.

For more information, pricing or a demonstration call your account representative at (888) 224-7377

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