

Technical Answer Group

The resource for your pension-related questions

Direct, personal answers to your pension-related questions in one business day

The Technical Answer Group (TAG) is a team of specialists who respond to hundreds of technical questions submitted by pension professionals each day.

In addition to answering your questions within one business day, TAG gives you links to primary source materials, an extensive database of previously asked questions, industry and legislative news updates and much more.

How TAG works

E-mail your questions to a technical representative, and you'll receive a response within one business day—it's that simple! You can rest assured that TAG answers are accurate and reflect current legislation.

E-mail your question and receive a response in one business day or less

*TAG has been absolutely GREAT!!
Your service gives us the ability to respond to technical issues so much quicker than we were ever able to before.
—CPI Qualified Plan Consultants, Inc.*

In addition to direct access to specialists, your TAG subscription delivers . . .

New TAG Stuff

New TAG Stuff includes daily updates and late-breaking news concerning the DOL, IRS, PBGC and other industry sources. Each day's New TAG Stuff is e-mailed to you.

Missed an update? Check the New TAG Stuff archive, which contains the current three weeks as well as the past three weeks of New TAG Stuff.

TAG FAQs

Search through a robust database of previously and frequently-asked questions from other pension professionals to find accurate, immediate answers to your questions related to:

- 401(k)
- 403(b)
- Defined Benefit
- ESOP
- IRA
- QDRO
- Rollovers
- Top Heavy Issues
- Plan Document Issues
- Mergers and Acquisitions
- Vesting and Forfeitures
- ... and many more

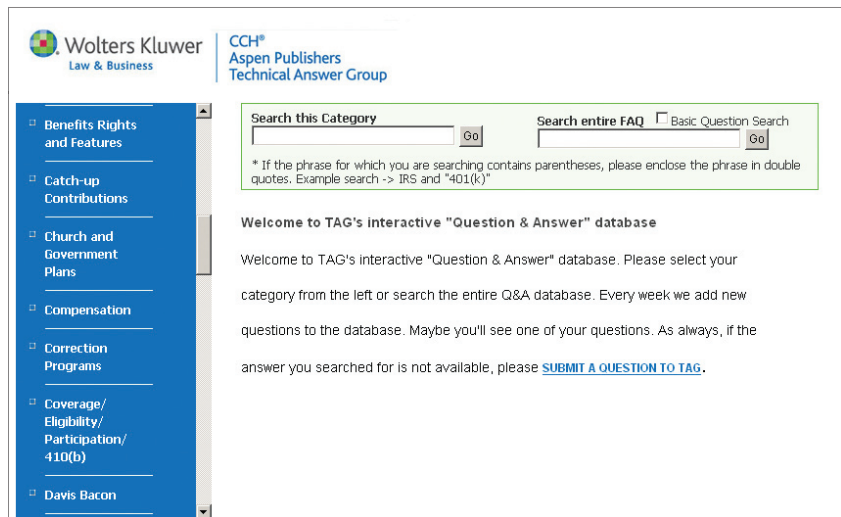
You can search by keyword or phrase, by category or search the entire database of frequently asked questions.

Using TAG as a technical resource saves us hours and hours of research time every year. TAG always provides the back-up information as well for their answers so we know the source and can rely on the accuracy of TAG's answers.

—Sheffler & Martin, Inc.

Articles & Research

Are you tired of sifting through traditional news mediums to find industry news? Access thousands of current and archived articles pulled from hundreds of sources and ensure you are in-the-know.



Find your answer within a previously answered question by searching within a category—or search the entire FAQ at once.

Internal Revenue Resource

This section provides source documents from the IRS. Everything is categorized in a format that makes it easy to locate the information you need. Document topics include:

- Internal Revenue Code
- Treasury Regulations
- General Counsel Memorandum
- IRS Legal Memoranda
- Internal Revenue Manual
- IRS Announcements
- IRS Forms
- IRS News and Bulletins
- IRS Notices
- IRS Publications
- Required Modifications
- Letter Rulings
- Revenue Procedures
- Revenue Rulings
- Tax Treaties
- ... and much more

Quick Reference

Here you'll find helpful and easy-to-use tables, charts, spreadsheets and information—all in one place. Need to verify who is a highly compensated employee? Use our chart and find out in a matter of seconds. Need to know what the taxable wage base was in 1984? We have all of the pension limits listed since 1975!

Department of Labor Resource

Obtain documentation related to:

- Advisory Opinions
- Interpretative Bulletins
- ERISA Act Sections
- General DOL information
- 5500 Forms
- Prohibited Transaction Exemptions
- ... and much more

PBGC Resource

Retrieve data on PBGC regulations, technical updates, interest rates, press releases and opinion letters.

Court Cases

Access cases sorted by year dating back to 1974, cases dating before 1974, proposed legislation dating back to 1997 as well as enacted laws.



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