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CHECKLIST

Pension and Benefits eLIBRARY

(Check the titles to be included)

ASPEN
PUBLISHERS

Call 1-888-CCH-REPS (888-224-7377) to speak to your CCH sales representative.

PENSION IN GENERAL

- Pension Answer Book** is an extremely reliable, established, and comprehensive desk reference manual. Its 36 chapters provide an excellent survey of all areas of pension administration and compliance.
- Plan Termination Answer Book** explains the complexities of terminating pension plans.
- Pension Distribution Answer Book** covers all aspects of qualified plan distributions.
- Journal of Pension Planning and Compliance** provides in-depth coverage of pension compliance and design issues.
- Journal of Pension Benefits** this journal provides new ideas, fresh insights, and expert views on key topics affecting plan design, compliance, and administration.
- 5500 Preparer's Manual** details guidance on preparing the required annual Form 5500 filing for pension benefit and welfare benefit plans.

ERISA

- ERISA Fiduciary Answer Book** explains the full range of ERISA fiduciary duty.
- ERISA Law Answer Book** discusses and analyzes case law regarding administration and compliance of pension benefit and welfare benefit plans.

DEFERRED COMPENSATION

- Nonqualified Deferred Compensation Answer Book** covers all aspects of planning, funding, and administering these plans.
- Journal of Deferred Compensation** helps navigate the government rules that limit the salary and benefits of top employees and controls employer tax liabilities.

QDRO

- Qualified Domestic Relations Order (QDRO) Answer Book** covers a wide range of issues relating to administering QDROs and QMCSOs and complying with governmental regulations.

RETIREMENT PLANNING

- Annuities Answer Book** covers fixed and variable annuities, with regulatory and tax implications.
- Guide to Cash Balance Plans** examines this type of defined benefit plan that incorporates elements of defined contribution plans.
- Employee Stock Ownership Plan (ESOP) Answer Book** discusses ESOPs as a business strategy and its compliance and administration implications.
- 401(k) Answer Book** covers this type of plan, where employees make pretax contributions to a profit sharing or stock bonus plan.
- 403(b) Answer Book** discusses tax-sheltered annuities that are available only to education and charitable organizations.
- 457 Answer Book** covers plans of tax-exempt organizations and state and local governments.
- Defined Benefit Plan Answer Book** discusses plans where the amount of pension payments is fixed—without reference to the amount contributed to the plan.
- SIMPLE, SEP, and SARSEP Answer Book** covers subsets of 401(k) plans and Individual Retirement Accounts.
- Individual Retirement Account (IRA) Answer Book** covers the full range of IRA issues – contributions, investment, distributions, taxation, etc.
- Roth IRA Answer Book** covers administration and operation of Roth IRAs.

PLAN CORRECTION

- Coverage and Nondiscrimination Answer Book** details rules and testing procedures, as well as design and administration issues.
- Plan Correction Answer Book** details the steps necessary to avoid qualified plan failures.

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