

Pension eLIBRARY

(Check the titles to be included)

PENSION IN GENERAL

- ❑ #02314001 - **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.
- ❑ #02938001 - **Plan Termination Answer Book** explains the complexities of terminating pension plans.
- ❑ #02685001 - **Pension Distribution Answer Book** covers all aspects of qualified plan distributions.
- ❑ #02861001 - **Journal of Pension Planning and Compliance** provides in-depth coverage of pension compliance and design issues.
- ❑ #02866001 - **Journal of Pension Benefits** this journal provides new ideas, fresh insights, and expert views on key topics affecting plan design, compliance, and administration.
- ❑ #02465001 - **5500 Preparer's Manual** details guidance on preparing the required annual Form 5500 filing for pension benefit and welfare benefit plans.

ERISA

- ❑ #02519001 - **ERISA Fiduciary Answer Book** explains the full range of ERISA fiduciary duty.
- ❑ #02529001 - **ERISA Law Answer Book** discusses and analyzes case law regarding administration and compliance of pension benefit and welfare benefit plans.

DEFERRED COMPENSATION

- ❑ #02925001 - **Nonqualified Deferred Compensation Answer Book** covers all aspects of planning, funding, and administering these plans.
- ❑ #02867001 - **Journal of Deferred Compensation** helps navigate the government rules that limit the salary and benefits of top employees and controls employer tax liabilities.

PLAN CORRECTION

- ❑ #02516001 - **Coverage and Nondiscrimination Answer Book** details rules and testing procedures, as well as design and administration issues.
- ❑ #02928001 - **Plan Correction Answer Book** details the steps necessary to avoid qualified plan failures.

RETIREMENT PLANNING

- ❑ #09773001 - **Governmental Plans Answer Book** goes step-by-step through the various laws that govern these types of plans.
- ❑ #02465001 - **Cash Balance Plan Answer Book** examines this type of defined benefit plan that incorporates elements of defined contribution plans.
- ❑ #02518001 - **Employee Stock Ownership Plan (ESOP) Answer Book** discusses ESOPs as a business strategy and its compliance and administration implications.
- ❑ #02462001 - **401(k) Answer Book** covers this type of plan, where employees make pretax contributions to a profit sharing or stock bonus plan.
- ❑ #02461001 - **403(b) Answer Book** discusses tax-sheltered annuities that are available only to education and charitable organizations.
- ❑ #02463001 - **457 Answer Book** covers plans of tax-exempt organizations and state and local governments.
- ❑ #02517001 - **Defined Benefit Plan Answer Book** discusses plans where the amount of pension payments is fixed—without reference to the amount contributed to the plan.
- ❑ #02931001 - **SIMPLE, SEP, and SARSEP Answer Book** covers subsets of 401(k) plans and Individual Retirement Accounts.
- ❑ #02924001 - **Individual Retirement Account (IRA) Answer Book** covers the full range of IRA issues – contributions, investment, distributions, taxation, etc.
- ❑ #02848001 - **Roth IRA Answer Book** covers administration and operation of Roth IRAs.

QDRO

- ❑ #02748001 - **Qualified Domestic Relations Order (QDRO) Answer Book** covers a wide range of issues relating to administering QDROs and QMCSOs and complying with governmental regulations.