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Plan Corrections eSource

The "must have" resource to help you fix broken plans.

Mistakes happen.

And when it comes to retirement plans, they happen a lot. The complexity of plan terms and designs, the volumes of legal requirements, employer unwillingness or inability to follow clear directions, and our human capacity to mess up guarantee that there will be failures.

Comprehensive.

Fortunately, the IRS and DOL have provided toolkits which enable us to patch up most flaws. This new eSource addresses all the common and not-so-common retirement plan blunders and provides step-by-step instructions for making things right again. From overpayments to missed deferrals, from late deferrals to late returns, from self-correction to VCP to audit CAP, this eSource will walk you through the available corrections with practical suggestions and a wealth of experience.

Practical Examples

The eSource contains hundreds of examples, many drawn from real cases, to illustrate the issues involved and it has been supplemented by hundreds of questions and answers from our ASK the Author service. Throughout the book you will find dozens of practice tips that go beyond the voluminous rules and provide the voice of experience. This is more than a recitation of the rules or a paraphrasing of the government guidance. This is practical insight, written in plain English, to make corrections less daunting to all.

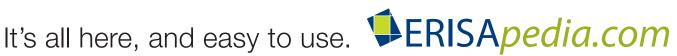
The Plan Corrections eSource is written by Alison J. Cohen, J.D., Ilene H. Ferenczy, J.D., CPC, APA, and S. Derrin Watson, J.D. Collectively, the authors have literally fixed thousands of broken plans and they share the insights that only such experience can garner.

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ERISApedia.com a Burrmont Compliance Labs Company 1730 New Brighton Blvd., Suite 104-229 Minneapolis, Minnesota 55413 • email sales@ERISApedia.com or call 612.605.2266