

Plan Distribution eSource

NAVIGATE RETIREMENT PLAN DISTRIBUTIONS WITH CLARITY AND CONFIDENCE

ERISApedia, a product of AmericanTCS's PensionPro, offers a powerful suite of web-based resources to professionals working with retirement plans.

A comprehensive guide to the who, when and how much of retirement plan distributions, incorporating the latest updates under SECURE 2.0. With high-level overviews and detailed explanations to support users at all experience levels with confidence.

THE ADVANTAGES

- Covers all distributable events in one place
- Fully updated to reflect SECURE 2.0 changes
- Guidance on required minimum distributions (RMDs)
- Includes 1099-R reporting requirements
- Addresses participants loans, rollovers, hardships and disaster distributions

THE AUTHOR



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With over 45 years of experience dealing with retirement plans, Derrin is an ERISA educator, frequently providing web seminars with ERISApedia and making presentations at seminars and conferences.

In 2006, ASPPA awarded Derrin its Educator's Award for his work in providing professional education to plan practitioners. In 2023, NIPA awarded him their Lifetime Achievement Award for his contributions to the pension industry.

Let's talk.

Email sales@ERISApedia.com to schedule a demo today.