



401(k) Answer Book

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Quite simply, the hunt for specific answers to important questions begins - and ends - with this clear, comprehensive resource.

401(k) Answer Book covers all aspects of plan design and administration, as well as the relationships of 401(k) plans with other types of retirement plans. When participants, sponsors, or service providers ask you questions, this book gives you the answers.

401(k) Answer Book provides coverage of 401(k) plan design, testing, taxation, reporting and disclosure, and termination, and brings you up to date on investment-related topics and regulatory guidance.

Written by the experts at Great-West Financial, this comprehensive one-volume desk reference is a must have for pension administrators, benefits managers, fund managers, trustees, accountants, attorneys, human resource professionals, consultants, advisors, and anyone who deals professionally with 401(k) plans.

401(k) Answer Book, 2015 Edition is packed with special features, including:

- A 401(k) Compliance Calendar
- An IRS Rollover Chart
- A chart of key participant disclosures and notices with cross-references to chapters for detailed information
- Up-to-date sample notice templates for safe harbor 401(k) plan notices, automatic enrollment notices, and QDIA notices (appendices A, B, and C)
- Sample Section 404(c) checklist
- Information on rollover rights of nonspouse beneficiaries
- Model notice for an EIAA
- Practical information on partial plan terminations, plan mergers, and spinoffs
- Fiduciary guidelines for selecting an annuity payment option
- And much more!

401(k) Answer Book, 2015 Edition has been updated to include coverage of:

- IRS guidance on in-plan Roth rollovers and transfers under Notice 2013-74
- IRS final regulations regarding the reduction or elimination of safe harbor contributions mid-year
- IRS Notice 2014-19 with guidance on when 401(k) plans must adopt interim good-faith amendments to comply with IRS guidance issued in connection with the Supreme Court's decision in *United States v. Windsor*
- Issuance of IRS Notice 2014-19, IRS Revenue Ruling 2013-17, and DOL Technical Release No. 2013-04 with guidance on how the Windsor decision should be implemented in the context of employee benefit provisions
- Department of Labor (DOL) proposed regulations that would require some service providers to provide a guide or index with their initial 408(b)(2) disclosure
- IRS guidance limiting 60-day rollovers between multiple IRAs in one calendar year
- IRS Revenue Ruling 2014-9 on when a plan administrator is considered to have reasonably concluded that a proposed rollover contribution is valid
- Applicable guidance regarding when mid-year amendments to safe harbor plans are permitted

- Updated status of prototype and volume submitter plan documents in the context of PPA, HEART, and WRERA, and the deadline by which an employer must adopt a pre-approved plan reflecting those developments
- Status of the Internal Revenue Service and Social Security Administration letter-forwarding services

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