

Cash Balance Plan Answer Book

Cash Balance Plan Answer Book is the only resource that provides reliable answers to over 500 cash balance plan questions. Logically organized in the popular QandA format, the Cash Balance Plan Answer Book is a user-friendly guide that explains the fundamentals of cash balance plans and how and when to use them. This unique resource provides support as you consider - and implement - cash balance plans. Cash Balance Plan Answer Book enables you to:

- Determine whether cash balance plans are right for your company or your clients
- Explain exactly how cash balance plans work
- Clarify how cash balance plans can be used with traditional retirement plans or 401(k) plans for the benefit of both the plan sponsor and participants
- Advise clients and executives on the pros and cons of cash balance plans
- Guide your company or clients through the effective implementation of cash balance plans
- Answer any cash balance plan question that comes up along the way

Here is just a sampling of the over-500 key questions that are answered in this one-of-a-kind resource:

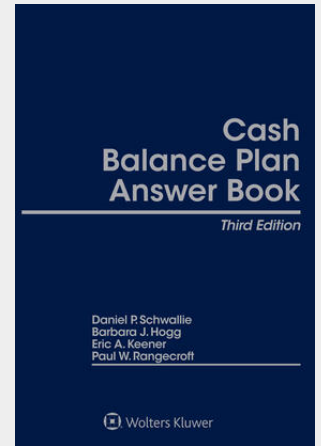
- How prevalent are cash balance plans?
- Are there advantages of a cash balance plan over a defined contribution plan?
- What types of business considerations would cause an employer to prefer a cash balance plan over a traditional defined benefit pension plan?
- How have traditional plans been converted to cash balance plans?
- What rules does the PPA create for cash balance plans?
- How does the PPA change the age discrimination rules for cash balance plans?
- How are qualified domestic relations orders (QDROs) administered under a cash balance plan?
- What special considerations apply to cash balance plans for accrual rule purposes?
- Are there special considerations when terminating a cash balance plan?
- What special issues may apply to plans converted to cash balance before the PPA?

You'll also receive:

- Planning tips - to get you on the right track from the start
- Examples - to clarify complex issues
- Cautions - to help you avoid pitfalls
- Explanations of the law - to make sure you understand all the rules and regulations

The Third Edition of Cash Balance Plan Answer Book has been updated to include:

- Expanded discussion of pension equity plans
- Updates for the 2014 hybrid plan regulations
- Revised treatment of cash balance and pension equity plans under the final hybrid plan regulations with respect to whipsaw and age discrimination
- Discussion of new pre-approved cash balance plan document program of Revenue Procedure 2015-36
- Overview of 2015 proposed DOL fiduciary rules
- And much more!



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