



401k Answer Book

Great-West Retirement Services

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401(k) Answer Book, 2009 Edition 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 Retirement Services, the **2009 Edition** is packed with special features, including:

- Practice pointers
- Checklists, charts, and sample notices
- Step-by-step procedures
- Examples showing how to apply concepts to real-world situations

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 continues to focus on all the latest developments, including:

- Details on the DOL's proposed regulations regarding participant investment and fee disclosure
- Automatic enrollment design options
- Final DOL regulations regarding qualified default investment arrangements (QDIAs)
- Service provider fee disclosure requirements, including those impacting Form 5500 disclosures
- Qualified optional survivor annuity (QOSA) requirements
- Roth 401(k) plans

The **2009 Edition** also features...

- Information on the Heroes Earnings and Assistance Relief Act (HEART) of 2008
- An updated ERISA Section 404(c) checklist
- Discussion of ERISA spending accounts
- Information regarding rollovers to Roth IRAs
- Final Code Section 415 regulations
- Providing investment advisory services to plan participants
- Regulatory guidance on the use of electronic technologies for satisfying notice and consent requirements

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.

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