

Dealing with Documents---Rev. Proc. 2007-44 Changes to the New Determination Letter Program



The ninth webcast in the 2007 webcast series

Presented by: Marty Pippins, Manager, IRS, Ingrid Grinde, Tax Law Specialist, IRS, Craig Hoffman, APM, SunGard Corbel LLC

September 12, 2007

2:00 p.m. – 3:40 p.m. Eastern
1:00 p.m. – 2:40 p.m. Central
12:00 p.m. – 1:40 p.m. Mountain
11:00 a.m. – 12:40 p.m. Pacific

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What's the Topic?

Keeping tax-qualified retirement plan documents compliant with tax and labor laws has always been a challenge. Experience, however, with the new determination letter program caused the IRS to issue Rev. Proc. 2007-44, which made some important and significant changes to Rev. Proc. 2005-66. This webcast will focus on how Rev. Proc. 2007-44 has modified the rules for keeping plan documents up-to-date.

Join Marty Pippins, IRS, Ingrid Grinde, IRS, and Craig Hoffman, SunGard Corbell LLC, in a panel discussion of these changes. Topics expected to be discussed include:

- Interim/Discretionary Amendments
- Cumulative List Changes
- Revised 5-year Cycle Rules
- New Options for Off-Cycle Filing
- Revised 6-year Cycle Rules
- EGTRRA Deadlines
- PPA '06 Updating

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