

Final Code §403(b) Regulations: It's Finally Here!



The eighth webcast
in the 2007
webcast series

Presented by: Robert J. Architect, Senior Tax Law Specialist, IRS, and David A. Pratt, APM, Albany Law School

August 16, 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
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What's the Topic?

The Internal Revenue Service (IRS) has issued the long-awaited final regulations on tax-sheltered annuities under Internal Revenue Code (Code) §403(b), and the Department of Labor (DOL) has issued guidance on the ERISA safe harbor for certain employee-funded 403(b) arrangements. The webcast will feature a detailed discussion of the new rules, including the controversial plan document requirement and the new responsibilities imposed on employers. We are pleased that Robert J. Architect, Senior Tax Law Specialist, IRS, will be part of our panel.

Join Robert J. Architect and David A. Pratt, APM, Albany Law School, in a discussion on many of the practical applications of these new regulations, such as:

- Written plan document requirement;
- Material provisions regarding eligibility, benefits and applicable limitations;
- Clarification of the time and form of benefit distributions;
- Clarification of the ERISA safe harbor under §2510.3-2(f).

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Live on August 16
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