

Written 403(b) Plans and How They Affect Contract Transfers



The fifth webcast in the 2008 webcast series

Presented by: S. Derrin Watson, APM, SunGard Corbel LLC, ASPPA, and Kristi Cook, Law Offices of M. Kristi Cook, PC, NTSAA

April 16, 2008

2:00 p.m. – 3:40 p.m. Eastern
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What's the Topic?

No issues in the final 403(b) regulations have proven as controversial or thorny as the requirement for contracts to be maintained pursuant to a written plan, and the related requirements for information sharing agreements. Much uncertainty surrounds these issues, despite recent guidance from both the IRS and DOL. Join Derrin Watson from the American Society of Pension Professionals & Actuaries (ASPPA) and Kristi Cook from the National Tax Sheltered Account Association (NTSAA) in a discussion of:

- The key requirements for contracts maintained pursuant to written plans;
- The impact of these requirements on plan terminations and the deferral-only ERISA exemption; and
- The recently released grandfather rules and model plan document.

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