

Continuing Education Quiz

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Circle One

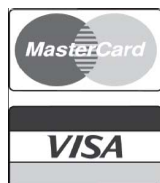
- True or False 1. Even if the employer chooses to pull all welfare benefit programs together under one document, the welfare plans still exist separately and require separate filings for 5500s.
- True or False 2. When utilizing a Retirement Income Security Plan (RISP), all benefit payments would commence at age 65, regardless of employment status.
- True or False 3. Suggested features for the proposed Retirement Income Security Plans (RISPs) would allow for a mid-career benefit payout due to work-related academic/training sabbatical, pressing family care need or approved philanthropic venture.
- True or False 4. The maximum annual deduction limit for a 401(k) plan would be limited because of the Retirement Income Security Plans (RISP).
- True or False 5. Currently, in the case of an ADP failure, HCEs who defer more than the test allows because they are over 50 would have most amounts if not all reclassified as catch-up, while other HCEs would be subject to unnecessary refunds.
- True or False 6. Cash balance plans may allow assets to be self-directed by the participants.
- True or False 7. A Pension Equity Plan is a type of defined benefit hybrid plan under which benefits are expressed as an accumulated percentage of the participant's final average compensation.
- True or False 8. Cash balance plans are not subject to the actuarial certification or Schedule B requirements.
- True or False 9. Small plans (100 or fewer participants on the last day of the preceding plan year) are exempt from the additional funding requirements of IRC 412(1).
- True or False 10. The PBGC agrees that in the absence of published guidance, Schedule B, line 9l(1) – ERISA Full Funding Limit should be left blank.

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