

Events

Knowledge Congress Webcast: Conquer the New World of 403(b) Retirement Plans

ATTORNEYS & PROFESSIONALS

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SERVICES

David Levine will participate as a speaker in the Knowledge Congress Webcast, “Conquer the New World of 403(b) Retirement Plans,” on May 5th from 12:00 PM to 2:00 PM ET. As 403(b) regulations tighten and financial markets fluctuate, nonprofit organizations are under greater scrutiny.

The Department of Labor (DOL) has expanded the Form 5500 reporting and audit requirements that fall on nonprofit plan sponsors. And in 2007, the IRS issued final regulations that updated and consolidated over 40 years of legislative and regulatory guidance, generally effective for taxable years beginning January 1, 2009. As a result of these changes, it’s crucial for nonprofit plan sponsors to understand the new fiduciary responsibilities and to have a due diligence process in place to reduce risk and limit or mitigate fiduciary liability.