GROOM LAW GROUP

Events

Law Firm Pension & Retirement Plans 2011

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SERVICES

David Levine will participate in the breakfast briefing, "Law Firm Pension and Retirement Plans 2011: Long Awaited IRS Regulations Offer New Opportunities, Significant Changes. What are the Best Strategies Now?" on March 17, 2011 in Washington, DC. The breakfast briefing is sponsored by PWC, HSBC and Sandpiper Partners and the panelists will address such critical topics as:

- How do the new cash balance regulations represent an improvement over existing pension approaches?
- What are the limitations and potential pitfalls when implementing a market-rate cash balance plan?
- What information must be disclosed to plan participants and how can this information be obtained and distributed as will be required within the next year?
- How does a firm structure its plans to minimize legal liabilities for firm management?
- What steps can a firm take to ensure that it is obtaining necessary disclosures of fees paid to the advisors to its plan and by the investment funds in its plan effective 2011?
- How are firms using Roth contributions in their plans?