

Publications

Tax Reform Series II: Retirement Plan and IRA Provisions

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This summary of the tax bill focuses on the rather limited changes made to pension benefits and IRAs. Unfortunately, a number of the participant-friendly provisions in the House and Senate bills did not survive to the final tax bill, but stay tuned as Congress has pension reform on the front burner, which could give rise to a number of more sweeping changes later this year. A summary of the changes, and next steps for plan sponsors and IRA providers, are summarized below.

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