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Henry A. Smith, nationally known employee benefits and ERISA attorney and author of the Nonqualified Deferred Compensation Answer Book, calls the Guide 'an invaluable resource for anyone looking for an introduction to -- or a 'deep dive' into the various rules that must be considered by persons responsible for or operating ERISA governed retirement plans.'

*[PDF] Erisa Fiduciary Answer Book by William F. Brown ...*

9780735591189 ERISA fiduciary answer book, 6th ed. Ferrera, Tess J. Aspen Publishers, Inc. 2010 \$309.00 Hardcover KF3512 This book is designed as a comprehensive reference to Title I of the Employee Retirement Income Security Act of 1974 (ERISA), for consultants, plan administrators and plan trustees, investment managers, accountants, attorneys, pension professionals, and employee benefit plan ...

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Be aware of your fiduciary responsibilities and how to handle them safely with ERISA Fiduciary Answer Book. This expert reference book clearly explains every aspect of ERISA fiduciary duty, providing information, guidance, and advice on prohibited transactions, investments, fiduciary liability, IRS, DOL, and PBGC requirements, and more. It answers more than 400 fiduciary-related questions, including: When are attorneys, accountants, consultants, and other professional service providers considered plan fiduciaries? What laws govern the conduct of fiduciaries? When is a fiduciary personally liable for a transaction prohibited by ERISA or the Internal Revenue Code? May a plan release a fiduciary from liability? What is the legal distinction between "substantive prudence" and "procedural prudence"? May a fiduciary face criminal liability for a breach of fiduciary duty? ERISA Fiduciary Answer Book has been updated to include: New questions discussing COVID-19's impact on fiduciary obligations, including (1) on ESOP valuations (2) on filing deadlines and funding requirements, (3) on day-to-day plan operations, and (4) on employee health plans Discussion of Santomemno v. Transamerica, and whether a service provider negotiating terms of a contract owe a duty to plan participants during the bargaining process New question on when a service provider becomes a fiduciary when it pays itself using discretion provided in its service agreement Discussion of Supreme Court in Retirement Plan Committee v. Jander revisiting the issues on the fiduciary standards applicable to inside information and employer stock investments New question on whether a fiduciary violated ERISA's prudence provision by picking a conservative performance benchmark for its stable value fund New question on whether a plan fiduciary violates ERISA's standard of care if it selects proprietary target date funds charging higher fees rather than other similar non-proprietary products Discussion of Supreme Court ruling in Intel Corp. Investment Com. v. Sulyma on when the six-year statute of limitation period is reduced by "actual knowledge." Discussion of Supreme Court ruling in Thole v. U.S. Bank N.A., on Article III standing requirements to bring suits for breaches of fiduciary duties New section on application of arbitration to ERISA fiduciary claims New section discussing plan investments in private equity Update on DOL's new model COBRA notice Update on new DOL regulations providing safe harbor for electronic disclosures of required plan information

The ERISA Fiduciary Answer Book: Forms and Worksheets provides samples of the numerous documents required for meeting ERISA fiduciary regulations. Dozens of ready-to-use forms, worksheets, checklists, and other tools are included to take you step by step through the maze of ERISA compliance. Complex tasks are made simple, and clear-cut explanations are presented to determine how and when certain rules apply. with this extraordinary resource you'll be able to: Determine if a plan falls under fiduciary rules and how to complyRecognize fiduciaries and nonfiduciariesShare, shift, and/or allocate fiduciary responsibility properlyManage the fiduciary responsibility efficiently without undue riskAvoid liabilitiesAnd more!Every key area of fiduciary responsibility is thoroughly covered, and the sample documents and procedures make compliance easy.