



Section 403(b) Compliance Guide for Public Education Employers

Ellie Lowder

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Whether employers are self-administering their 403(b) plans, or are using a Third Party Administrator (TPA), the in depth information in this book will provide a guide to the regulations, and the tools needed to correctly operate the plan. Busy School Business Officials can use this guide with payroll or Human Resources personnel to train them in the proper day to day operation of the plan and avoid the pitfalls that would create plan violations. The material is invaluable in maintaining oversight of the TPA, and the providers of product and investments. SBOs using previous editions of the book have reported that its use has provided an “all in one” resource for a step by step program to a worry-free 403(b) plan that benefits both the employer and the employees in this time of concerns about basic pension and social security benefits.” The 4th edition contains all available guidance at press time, including the IRS document approval program, and correction procedures for plan failures.

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