



401k Answer Book: Forms & Worksheets

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401(k) Answer Book: Forms & Worksheets will assist plan sponsors and plan service providers with many tools necessary to take advantage of, and comply with, Pension Protection Act of 2006 (PPA) provisions.

Although it is designed to be immediately useful to the experienced practitioner, it is also designed to be used along with Aspen's *401(k) Answer Book*. The arrangement of chapters in *Forms & Worksheets* follows closely that of the *Answer Book*.

Highlights of the *401(k) Answer Book: Forms & Worksheets* include:

- A **BONUS CD-ROM** that includes many of the tables, forms, flowcharts, and worksheets in the book which you can customize for your particular plan or company (Click [here](#) for a complete list of the CD-ROM contents)
- Participant distribution forms that facilitate Roth accounts, IRA rollovers by non-spouse beneficiaries, hardship distributions to beneficiaries, and other PPA changes
- A sample participant statement incorporating PPA changes to ERISA Sect. 105(a)
- Sample participant notices for QDIA's, EACA's and QACA's
- A sample employer stock diversification notice as required by IRC Sect. 401(a)(35)

401(k) Answer Book: Forms & Worksheets also provides an overview of IRS and DOL forms needed to comply with reporting and disclosure requirements for 401(k) plans and directs readers to a host of helpful forms and information available on the IRS and DOL websites. Readers are provided with an overview and directed to website information that can:

- Help them decide the right plan design for their organization
- Assist them with fulfilling their fiduciary responsibilities, including the steps they should take when hiring plan service providers
- Learn how to identify and correct common plan mistakes that might otherwise lead to disqualification or the plan
- Identify what government forms they need to file and get access to the most current version of those forms and instructions

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