

Cash Balance Plans: An Alternative for Small Businesses

Course Overview

The course explores cash balance retirement plans and their uses, how they operate and how they can be used in conjunction with 401(k) plans. Understanding the differences between cash balance and 401(k) plans is another key theme throughout the presentation. The course also helps students identify which organizations may benefit from a cash balance plan and how to initiate these discussions with business. Also discussed are cash balance plan design considerations, reporting and compliance rules and the process by which these plans are established.

Learning Objectives

- Awareness of when cash balance plans (CBP) are appropriate.
- Become familiar with 401(k) and cash balance coordination.
- Understand cash balance plans and how they operate.
- Familiar with investment process and structure.
- Cognizant of the roles and duties of the cash balance team.

In order to be awarded the full credit hours, you must be present for the entire session, registering your attendance and departure in the webinar and answering all polling questions.

Participants will earn 1.0 CPE credit. Program is free.

Field of Study: Specialized Knowledge

Additional Information:

Prerequisites: 3-5 years experience in the industry

Who should attend: Financial Professionals and Accountants; others are welcome.

Advanced Preparations: None

Program Level: Intermediate

Delivery Method: Group Internet Based

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