

Roth Employer Contributions: More Ways to Roth

Course Overview

Plan participants may have a new ability to treat employer contributions as designated Roth contributions within 401(k), 403(b) or governmental 457(b) plans, in addition to their own deferrals. If the plan permits, participants may elect to treat their vested employer contributions as a designated Roth matching or nonelective contributions in the year the amounts are allocated to their accounts. This process offers a strategy to reduce future required minimum distributions and create additional tax-free Roth distributions. The course overviews the trade-offs and considerations when making decisions concerning designated Roth contribution opportunities.

Learning Objectives

- Exploring the mechanics of the designated Roth contribution election process
- Familiarity with the tax and reporting implications of these elections
- Plan operational and timing requirements
- Awareness of plan amendment and timing rules

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

Refunds and Cancellations: For more information regarding refund, complaint and program cancellation policies, please contact our offices at 218-828-4872 or email info@cecenterinc.com

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