

Newkirk / McKay Hochman

403(b) PLAN EDUCATION

Fact Sheet

Description

The long-awaited, final regulations for 403(b) tax-sheltered arrangements were released by the IRS in July 2007. Newkirk and its subsidiary, McKay Hochman, developed 403(b) communications and education that will help you to understand and communicate these important rules and other 403(b) changes to your clients and prospects.

Over 35 years of experience writing for and working with the financial services industry has made Newkirk a national leader in these communications, while McKay Hochman has long been a leading employee benefits consulting company.



For the Participants



Enrollment Booklets

Newkirk's enrollment booklets provide a comprehensive look at the plan-specific highlights, education, and fund specifics that 403(b) plan participants need to know about when getting started in a retirement plan. Booklets are generated on-demand through Newkirk's online publishing system, *EnrollPlus*®, and are shipped where you need them, when you need them.

Call today for samples of the booklets and to request a demo of the system. We can get you started immediately. And you'll be relieved that the enrollment process can be so easy. No inventory, no hassles.

Quarterly Newsletters

Newkirk's participant newsletters are produced on a quarterly basis and include retirement planning articles as well as investment education. Each issue highlights current topics of interest relevant to participants in a retirement plan and is designed to motivate participants to continue to take steps to adequately plan for their retirement years.



For Employers



Internet/HTML version Printed booklet

403(b) Plans: Your Questions, Our Answers

Navigating the federal tax regulations that govern Section 403(b) retirement arrangements can be a challenge for plan sponsors. Newkirk's *403(b) Plans: Your Questions, Our Answers* booklet and Internet/HTML version summarize key points in a highly accessible, question-and-answer format.

Topics include:

- Written plan document requirement
- Exchanges and transfers
- Universal availability rule
- Distributions
- Contribution limits

403(b) Perspectives Newsletter

This newsletter is published four times a year featuring new developments in the rules and regulations governing tax-sheltered arrangements.

McKay Hochman's 403(b) Plan Documents

As a leading benefits consulting company, McKay's experience in retirement plans makes their solution an easy one to ensure you get the service and results you are looking for. It's easy to generate a 403(b) plan through McKay Hochman's 401(k) Portal.

Need Samples? Have Questions?

Please call us at **518-862-3200** or visit **www.newkirk.com**.