

Upcoming 2013 Web Seminar Topics

Take advantage of this opportunity to be proactive in 2013 and help keep yourself and your staff abreast of new developments and rules in the ever-changing pension industry.

Most programs will open for registration approximately 4-6 weeks prior to the program date. To register for these and ad hoc hot topic Web seminars, please visit our website: www.relius.net/events/events.aspx?Web. Live Relius Education Web courses qualify for Continuing Education credit with most credentialing authorities.

Title	Tentative 2013 dates
*ERPA Test Review, Part I – A 3-part program <i>(repeated in July)</i>	January 2-4
*ERPA Test Review, Part II – A 3-part program <i>(repeated in July)</i>	January 8-10
*Fundamentals of 401(k) Plans series begins <i>(repeated July-August)</i> – 12 one-hour programs, 12 topics: Eligibility; Vesting; HCEs & Key Employees; Coverage Testing; 401(k) Testing – ADP, ACP and Catch-ups; Nondiscrimination Testing; Top-heavy Testing; Compensation; 415 Limit and Deductible Contributions; Taxation and Distribution; Controlled Groups; Plan Loans	January-February
401k Testing Techniques – A 2-part Program	January 29-30
Fundamentals of Cross-Tested Plans - A 3-part program	February 12-14
403b Plans for 401(k) Practitioners – A 3-part program	February 26-28
409A and 457(f): Nonqualified Deferred Compensation	March 5-7
Earned Income – Computing Compensation for the Self-Employed	March 19
Distributions and Taxation	March 21
457 Plans for 401(k) Practitioners <i>(repeated 8/15)</i>	April 4
Practical Guide to Plan Fee Disclosures - A 3-part program <i>(repeated 8/6-8)</i>	April 8-10
Form 5500/EFAST2 for Welfare Plans – A 2-part program	June 5-6
Forms 5500 and 8955-SSA for 403b Plans – A 2-part program	June 11-12
Cash Balance Plans for 401(k) Practitioners – A 3-part program	June 18-20
*ERPA Test Review, Part I – A 3-part program <i>(also presented in January)</i>	July 9-11
*ERPA Test Review, Part II- A 3-part program <i>(also presented in January)</i>	July 16-18
Practical Guide to Plan Fee Disclosures – A 3-part program <i>(also presented 4/8-10)</i>	August 6-8
457 Plans for 401(k) Practitioners <i>(also presented April 4)</i>	August 15
Safe harbor 401k Plans – A 3-part program	August 20-22
*Fundamentals of 401(k) Plans series begins (see Jan-Feb listing for topics)	September-October; dates available in July
403(b) Plans for 401(k) Practitioners – A 3-part program	September 9-11
Ethics and Professional Responsibility <i>(repeated 12/12)</i>	November 19
Required Minimum Distributions – Making Sense of the Rules	December 3
Ethics and Professional Responsibility <i>(also presented on 11/19)</i>	December 12
Keeping Current: Retirement Plan Developments of the Past Year	December 17
Form 1099-R: Not as simple as it looks	December 19

***SmartPass does not apply**

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