

Checkpoint – Pension & Benefits Sources

All Pension & Benefits Sources

- 83rd Congress – Committee Reports (Selected)
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- ACA Decision Support Tool
- Actions on Decisions (1967 - Present)
- Advance Notices of Proposed, Interim & Final DOL Rules
- Advance Notices of Proposed Rulemaking & Treasury Decisions
- Alabama
- Alaska
- American Federal Tax Reports (Current Year)
- American Federal Tax Reports (Prior Years)
- Analysis of IRS Restructuring and Reform Act of 1998
- Analysis of Tax and Trade Relief Extension Act of 1998
- Analysis of Taxpayer Relief Act of 1997
- Analysis of the Medicare, Medicaid, and Other Health Care Provisions of the 2010 Health Care Act as Amended by the 2010 Health Care Reconciliation Act
- Announcements (1959 - Present)
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- Arkansas
- Audits of Employee Benefit Plans
- Benefits Analysis
- Benefits Plan Documents and Clauses (RIA Authored)
- Benefits Planning (RIA Authored)
- Benefits Practice Aids (RIA Authored)
- Cafeteria Plans (EBIA)
- Cafeteria Plans (PPC)
- California
- Chief Counsel Advice
- Chief Counsel Bulletins

- Chief Counsel Notices
- Choosing Retirement Plans for Small Businesses
- COBRA: The Developing Law (EBIA)
- Colorado
- Compensation and Benefits
- Compensation Planning for Small Businesses
- Committee Reports (Code Arranged - USTR)
- Complete Analysis of the American Jobs Creation Act of 2004
- Complete Analysis of the American Recovery and Reinvestment Act of 2009
- Complete Analysis of the American Taxpayer Relief Act of 2012 and Earlier Acts of the 112th Congress
- Complete Analysis of the AMT Patch, Mortgage Relief, Energy, Technical Corrections, and Other Late 2007 Tax Acts
- Complete Analysis of the Community Renewal Tax Act of 2000, the Installment Tax Correction Act of 2000, and the FSC Repeal Act of 2000
- Complete Analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001
- Complete Analysis of the Education Jobs Act of 2010 and Other Recent Tax and Pension Acts
- Complete Analysis of the Heartland, Habitat, Harvest, and Horticulture Act of 2008
- Complete Analysis of the Heroes Earnings Assistance and Relief Tax Act of 2008
- Complete Analysis of the Job Creation and Worker Assistance Act of 2002
- Complete Analysis of the Jobs and Growth Tax Relief Reconciliation Act of 2003
- Complete Analysis of the Pension Funding Equity Act of 2004
- Complete Analysis of the Pension Protection Act of 2006
- Complete Analysis of the Protecting Americans from Tax Hikes Act of 2015, Other Tax Provisions of the Consolidated Appropriations Act, 2016, and Earlier 2015 Tax and Pension Acts
- Complete Analysis of the Tax and Benefits Provisions of the 2010 Health Care Act as Amended by the 2010 Health Care Reconciliation Act
- Complete Analysis of the Tax and Benefits Provisions of the Small Business Jobs Act of 2010
- Complete Analysis of the Tax and ERISA Provisions of the Tax Increase Prevention Act of 2014, the Achieving a Better Life Experience Act of 2014, the 2015 Continuing Appropriations Act, and Other Acts of the 113th Congress
- Complete Analysis of the Tax Provisions of the Energy and Transportation Acts of 2005

- Complete Analysis of the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010, RIC Modernization, and Other Late 2010 Tax Provisions
- Complete Analysis of the Tax Cuts and Jobs Act
- Complete Analysis of the Tax Provisions of the Medicare Act of 2003
- Complete Analysis of the Victims of Terrorism Tax Relief Act of 2001
- Complete Analysis of the Worker, Retiree, and Employer Recovery Act of 2008
- Complete Analysis of the Working Families Tax Relief Act of 2004
- Compliance Explanations
- Connecticut
- Consumer-Driven Health Care (EBIA)
- Critical Issues Series
- Delaware
- District of Columbia
- DOL Final Regulations & Interim Rules
- DOL Rulings & Releases
- Daily TaxBase Overview
- Delegation Orders (1956 - Present)
- Disclosure Litigation Bulletins & Other IRS Documents
- Employee Benefit Cases (Westlaw)
- Employee Benefits for Domestic Partners (EBIA)
- EBIA Glossary
- EBIA Weekly
- ERISA Compliance for Health & Welfare Plans (EBIA)
- ERISA (RIA)
- ERISA Annotations
- ERISA Arranged Committee Reports
- ERISA Explanations
- ERISA History
- ERISA Opinion Letters
- Executive Compensation Analysis
- Executive Compensation Surveys
- Executive Orders
- EY Tax Alerts
- Federal Taxation of Employee Compensation (Bittker & Lokken)
- Field Service Advice
- Final, Temporary & Proposed Regulations
- Final Miscellaneous Nontax Regulations
- Florida
- Form 1094/1095 Workbook for Employers and Advisors (EBIA)
- Fringe Benefits (EBIA)
- General Counsel Memoranda (1962 - Present)

- General Explanation of Tax Legislation Enacted in the 113th Congress (2015 Blue Book)
- General Explanation of Tax Legislation Enacted in the 112th Congress (2013 Blue Book)
- General Explanation of Tax Legislation Enacted in the 111th Congress (2011 Blue Book)
- General Explanation of Tax Legislation Enacted in the 110th Congress (Blue Book)
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- General Explanation of Tax Legislation Enacted in 1997 (Blue Book)
- General Explanation of Tax Legislation Enacted in the 104th Congress '96 (Blue Book)
- Georgia
- Group Health Plans: Federal Mandates Other Than COBRA & HIPAA (EBIA)
- Guide to Taxation of Benefits (Golub, Rand & Roark)
- Hawaii
- Health Care Reform for Employers and Advisors (EBIA)
- HIPAA Portability, Privacy & Security (EBIA)
- Idaho
- Illinois
- Indiana
- Individual Retirement Accounts
- Information Letters
- Internal Revenue Bulletins
- Iowa
- IR News Releases
- IRS Alert Guidelines (Pension & Benefits)
- IRS Exemption Letters
- IRS Fact Sheets
- IRS Publications
- IRS Technical Assistance
- Journal of Taxation of Employee Benefits
- Kansas
- Kentucky
- Legal Advice Issued by Associate Chief Counsel

- Legal Advice Issued by Field Attorneys
- List of Required Modifications
- Litigation Guideline Memoranda
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Miscellaneous Nontax Statutes
- Miscellaneous Nontax Statutes History
- Miscellaneous State & Local Materials (Selected Domestic Partner Materials)
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Law Special Study
- New Mexico
- New York
- Non-Docketed Significant Advice Review
- Nondiscrimination Testing Tool
- Nonqualified Deferred Compensation Plans (McNeil)
- North Carolina
- North Dakota
- Notices (1980 - Present)
- Ohio
- Oklahoma
- Oregon
- Other Miscellaneous Nontax Releases
- Pamela D. Perdue's Pension & Benefits Update
- PBGC Final Regulations & Interim Rules
- PBGC Opinion Letters
- PBGC Rulings & Releases
- Pennsylvania
- Pension Analysis
- Pension & Benefits Annotations (Code Arranged)
- Pension & Benefits Explanations (Code Arranged)
- Pension & Benefits Updates
- Pension Planning (RIA Authored)
- Pension Practice Aids (RIA Authored)

- Plan Documents & Clauses
- PPC's 5500 Deskbook (with Interactive Practice Aids)
- PPC's Payroll Tax Deskbook (with Interactive Practice Aids)
- Practitioners Plan Documents & Clauses
- Practitioner Planning Articles
- Preambles to DOL Final Regulations & Interim Rules
- Preambles to Final and Temporary Regulations (Treasury Decisions)
- Preambles to Miscellaneous Nontax Regulations
- Preambles to PBGC Final Regulations & Interim Rules
- Preambles to Proposed Regulations
- Prior Final & Temporary Regulations and Proposed Regulations & Preambles
- Private Letter Rulings & Technical Advice Memoranda (1953 - Present)
- Prohibited Transaction Exemptions
- Proposed DOL Regulations & Preambles
- Proposed Miscellaneous Nontax Regulations & Preambles
- Proposed PBGC Regulations & Preambles
- Qualified Pension and Profit Sharing Plans (Perdue)
- Quick Tax Amounts
- Revenue Procedures (1955 - Present)
- Revenue Rulings (1954 - Present)
- Rhode Island
- RIA Tax Watch
- Sample Documents (EBIA)
- SEC No Action Letters
- Selected U.S. Code and Federal Regulations
- Self-Insured Health Plans (EBIA)
- Service Center Advice
- Small Employer Retirement Plans
- South Carolina
- South Dakota
- Strategic Advice Memoranda
- State Source Material
- Table of Limits (EBIA)
- Tables for Complete Analysis of the 2000 Act
- Tables for Complete Analysis of the 2001 Act
- Taxation of Distributions From Qualified Plans (Bennett, Bradley et al.)
- Tax Court Memorandum Decisions (Current Year)
- Tax Court & Board of Tax Appeals Memorandum Decisions (Prior Years)
- Tax Court Reported Decisions (Current Year)
- Tax Court & Board of Tax Appeals Reported Decisions (Prior Years)
- Tax Court Summary Opinions
- Tennessee
- Texas

- Treasury Fact Sheets
- Treasury FAQs
- Treasury Press Releases
- U.S. Tax Treaties in Force
- Utah
- Vermont
- Virginia
- Washington
- West Virginia
- Willis Towers Watson Executive Compensation Materials
- Wisconsin
- Wyoming

Pension & Benefits Analysis, Annotations, Explanations and Newsletters

- Benefits Analysis
- Code Arranged Annotations
- Code Arranged Explanations
- EBIA Benefits Compliance Library
- EBIA Weekly
- ERISA Arranged Annotations
- ERISA Arranged Explanations
- Executive Compensation Analysis
- EY Tax Alerts
- Pension Analysis
- Pension & Benefits Updates
- Willis Towers Watson Executive Compensation Resources Newsletter

Code, Committee Reports, Regulations, Tax Treaties

- Advance Notices of Proposed Rulemaking & Treasury Decisions
- Code
- Code History
- Committee Reports (Code Arranged - USTR)
- Final, Temporary & Proposed Regulations
- Preambles to Proposed Regulations
- Prior Final & Temporary Regulations and Proposed Regulations & Preambles
- Preambles to Final and Temporary Regulations (Treasury Decisions)

Complete Analysis of New Law

- Analysis of IRS Restructuring and Reform Act of 1998
- Analysis of the Medicare, Medicaid, and Other Health Care Provisions of the 2010 Health Care Act as Amended by the 2010 Health Care Reconciliation Act
- Analysis of the Small Business, Health Insurance & Welfare Reform Acts of 1996
- Analysis of Tax and Trade Relief Extension Act of 1998
- Analysis of Taxpayer Relief Act of 1997,
- Complete Analysis of the American Jobs Creation Act of 2004
- Complete Analysis of the American Recovery and Reinvestment Act of 2009
- Complete Analysis of the American Taxpayer Relief Act of 2012 and Earlier Acts of the 112th Congress
- Complete Analysis of the AMT Patch, Mortgage Relief, Energy, Technical Corrections, and Other Late 2007 Tax Acts
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- Complete Analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001
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- Complete Analysis of the Heroes Earnings Assistance and Relief Tax Act of 2008
- Complete Analysis of the Job Creation and Worker Assistance Act of 2002
- Complete Analysis of the Jobs and Growth Tax Relief Reconciliation Act of 2003
- Complete Analysis of the Pension Funding Equity Act of 2004
- Complete Analysis of the Pension Protection Act of 2006
- Complete Analysis of the Protecting Americans from Tax Hikes Act of 2015, Other Tax Provisions of the Consolidated Appropriations Act, 2016, and Earlier 2015 Tax and Pension Acts
- Complete Analysis of the Tax and Benefits Provisions of the 2010 Health Care Act as Amended by the 2010 Health Care Reconciliation Act
- Complete Analysis of the Tax and Benefits Provisions of the Small Business Jobs Act of 2010
- Complete Analysis of the Tax and ERISA Provisions of the Tax Increase Prevention Act of 2014, the Achieving a Better Life Experience Act of 2014, the 2015 Continuing Appropriations Act, and Other Acts of the 113th Congress

- Complete Analysis of the Tax Provisions of the Energy and Transportation Acts of 2005
- Complete Analysis of the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010, RIC Modernization, and Other Late 2010 Tax Provisions
- Complete Analysis of the Tax Cuts and Jobs Act
- Complete Analysis of the Tax Provisions of the Medicare Act of 2003
- Complete Analysis of the Victims of Terrorism Tax Relief Act of 2001
- Complete Analysis of the Worker, Retiree, and Employer Recovery Act of 2008
- Complete Analysis of the Working Families Tax Relief Act of 2004
- New Law Special Study

DOL, PBGC & Other Rulings, Releases

- DOL Rulings & Releases
- ERISA Opinion Letters
- Other Miscellaneous Nontax Releases
- PBGC Opinion Letters
- PBGC Rulings & Releases
- Prohibited Transaction Exemptions
- SEC No Action Letters

EBIA Benefits Compliance Library

- 401(k) Plans
- Cafeteria Plans
- COBRA: The Developing Law
- Consumer-Driven Health Care
- EBIA Weekly
- Employee Benefits for Domestic Partners
- ERISA Compliance for Health & Welfare Plans
- Form 1094/1095 Workbook for Employers and Advisors
- Fringe Benefits
- Glossary
- Group Health Plans: Federal Mandates Other Than COBRA & HIPAA
- Health Care Reform for Employers and Advisors
- HIPAA Portability, Privacy & Security
- Sample Documents
- Self-Insured Health Plans
- Table of Limits

ERISA, Committee Reports, DOL & PBGC Regulations

- Advance Notices of Proposed, Interim & Final DOL Rules
- DOL Final Regulations & Interim Rules
- ERISA
- ERISA Arranged Committee Reports
- ERISA History
- PBGC Final Regulations & Interim Rules
- Preambles to DOL Final Regulations & Interim Rules
- Preambles to PBGC Final Regulations & Interim Rules
- Proposed DOL Regulations & Preambles
- Proposed PBGC Regulations & Preambles

Federal Tax & West Employee Benefit Cases

- American Federal Tax Reports (Current Year)
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- Tax Court Memorandum Decisions (Current Year)
- Tax Court & Board of Tax Appeals Memorandum Decisions (Prior Years)
- Tax Court Reported Decisions (Current Year)
- Tax Court & Board of Tax Appeals Reported Decisions (Prior Years)
- Tax Court Summary Opinions
- West Employee Benefit Cases

Indexes

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- Final & Temporary Regulations Topic Index
- Pension & Benefits Analysis Topic Index
- Proposed Regulations Topic Index

Internal Revenue Bulletins

IRS Publications, Rulings, Releases

- Actions on Decisions (1967 - Present)
- Announcements (1959 - Present)
- Chief Counsel Advice
- Chief Counsel Bulletins
- Chief Counsel Notices
- Delegation Orders (1956 – Present)

- Disclosure Litigation Bulletins & Other IRS Documents
- Executive Orders
- Field Service Advice
- General Counsel Memoranda (1962 - Present)
- Information Letters
- Internal Revenue Bulletins
- IR News Releases
- IRS Alert Guidelines (Pension & Benefits)
- IRS Exemption Letters
- IRS Publications, List of Required Modifications, Notices (1980 - Present)
- IRS Technical Assistance
- Legal Advice Issued by Associate Chief Counsel
- Legal Advice Issued by Field Attorneys
- List of Required Modifications
- Litigation Guideline Memoranda
- Non-Docketed Significant Advice Review
- Private Letter Rulings & Technical Advice Memoranda (1953 - Present)
- Revenue Procedures (1955 - Present)
- Revenue Rulings (1954 - Present), Service Center Advice
- Service Center Advice
- Strategic Advice Memoranda

Miscellaneous Nontax Statutes and Regulations

- Final Miscellaneous Nontax Regulations
- Miscellaneous Nontax Statutes
- Miscellaneous Nontax Statutes History
- Preambles to Miscellaneous Nontax Regulations
- Proposed Miscellaneous Nontax Regulations & Preambles

Pending & Enacted Legislation

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- General Explanation of Tax Legislation Enacted in 1997 (Blue Book)
- General Explanation of Tax Legislation Enacted in 1998 (Blue Book)
- General Explanation of Tax Legislation Enacted in the 104th Congress '96 (Blue Book)

Pension & Benefits Planning, Sample Clauses, Practice Aids

- Benefits Plan Documents and Clauses (RIA Authored)
- Benefits Planning (RIA Authored)
- Benefits Practice Aids (RIA Authored)
- Compliance Explanations
- Executive Compensation Surveys
- Form/Line Finders and Return Guides
- Pension Planning (RIA Authored)
- Pension Practice Aids (RIA Authored)
- Plan Documents & Clauses
- Practitioner Planning Articles
- Reporting and Disclosure Explanations

PPC's Compensation and Benefits Library

- 5500 Deskbook (with Interactive Practice Aids)
- Audits of Employee Benefit Plans
- Cafeteria Plans
- Choosing Retirement Plans for Small Businesses

- Compensation and Benefits
- Compensation Planning for Small Businesses
- Individual Retirement Accounts
- Payroll Tax Deskbook (with Interactive Practice Aids)
- Small Employer Retirement Plans

State Source Material

- Statutes
- Regulations
- Cases

Tools

- ACA Decision Support Tool
- Nondiscrimination Testing Tool

WG&L Pension & Benefits Treatises & Journal

- Federal Taxation of Employee Compensation (Bittker & Lokken)
- Guide to Taxation of Benefits (Golub, Rand & Roark)
- Qualified Pension and Profit Sharing Plans (Perdue)
- Taxation of Distributions From Qualified Plans (Bennett et al.)

West's Executive Compensation Treatise

- Nonqualified Deferred Compensation Plans (McNeil)

2017 Federal Archives

- Annotations (as of 12/31/2017)
- Code History (as of 12/31/2017)
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- Federal Tax Handbook (as of 10/31/2017)
- IRS Publications (as of 12/31/2017)
- PPC's Federal Tax Compliance Library

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2006 Federal Archives

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2017 ERISA & Miscellaneous Statutes Archives

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2016 ERISA & Miscellaneous Statutes Archives

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2015 ERISA & Miscellaneous Statutes Archives

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2014 ERISA & Miscellaneous Statutes Archives

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2013 ERISA & Miscellaneous Statutes Archives

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2012 ERISA & Miscellaneous Statutes Archives

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