

Retirement Plan Products

Tax Exempt & Government Entities (TE/GE)

To Help You Meet Your Business Tax Responsibilities

FEATURED ITEMS...

Retirement Plan Products for Small Businesses







Choosing a Retirement Plan

Publication 4118 (Catalog Number 35198N)

Lots of Benefits when you set up an employee retirement plan

4" x 9" color tri-fold

Pub 4118 highlights the benefits of a retirement plan, the first steps in learning about and setting up a plan, and the stages in the "life" of a retirement plan.

Publication 3998 (Catalog Number 34066S)

Choosing a Retirement Solution for Your Small Business

 $8 \frac{1}{2}$ " x II" color pamphlet

Pub 3998 displays (in chart format) various plans and their features and options so you can more easily select a retirement plan that meets the needs of your business.

Establishing/Operating a Retirement Plan

Information about Retirement Plans - These multi-page publications highlight the advantages and important items to consider when establishing and operating various plans. They also feature resource sections telling business owners where they can find additional help.

- Publication 4222 (Catalog Number 37055P)
 401(k) Plans for Small Businesses
 8 ½" × 11" color pamphlet
- Publication 4333 (Catalog Number 38507U)
 SEP Retirement Plans for Small Businesses
 8 ½" x 11" color pamphlet
- Publication 4334 (Catalog Number 38508F)
 SIMPLE IRA Plans for Small Businesses
 ½" x 11" color pamphlet
- Publication 4336 (Catalog Number 38511C)
 SARSEP Salary Reduction Simplified Employee Pension for Small Businesses
 ½" x 11" color pamphlet

Plan Check-Up & Checklists "Check-ups" are available to help business owners who sponsor certain retirement plans develop a better understanding of the requirements of their plans. Each one-page checklist reflects common operating problems that may arise.

- <u>Publication 4405 (Catalog Number 38980T)</u>, Have you had your Check-up this year? for SIMPLE IRAs, SEPs, and Similar Retirement Plans
- Publication 4284 (Catalog Number 37994X), SIMPLE IRA Plan Checklist

















- Publication 4285 (Catalog Number 37997E), SEP Checklist
- Publication 4286 (Catalog Number 37998P), SARSEP Checklist
- <u>Publication 4531 (Catalog Number 48552T)</u>, 401(k) Plan Checklist

Publication 4395 (Catalog Number 38889N)

Individual Retirement Arrangement (IRA) Resource Guide for Small Business Owners and Individuals

CD/ROM

Pub 4335 provides one-stop information to set-up, contribute to, invest in, and distribute from a Traditional IRA, Roth IRA, SEP, SIMPLE IRA, and Payroll Deduction IRA plan.

Publication 4224 (Catalog Number 37058W)

Retirement Plan Correction Programs

8" x 6" color tri-fold

Pub 4224 provides information describing retirement plan correction programs offered by the IRS, U.S. Department of Labor, and Pension Benefit Guaranty Corporation. These correction programs encourage plan sponsors to correct plan mistakes earlier rather than later. The IRS correction programs allow sponsors to correct these mistakes and thereby continue to provide their employees with retirement benefits on a tax-favored basis.

Publication 4050 (Catalog Number 34390V)

Retirement Plan Correction Programs

CD/ROM

Pub 4050 is a CD-ROM containing a comprehensive guide to the IRS, U.S. Department of Labor, and Pension Benefit Guaranty Corporation correction programs.

Newsletters – These periodic newsletters are sent to subscribers only through email. Free subscriptions are available at www.irs.gov/ep

• Publication 4278 (Catalog Number 37968B)

Retirement News For Employers – Designed for small business owners and employers, this newsletter provides practical retirement plan information.

• Publication 3749 (Catalog Number 31746D)

Employee Plans News – Designed specifically for retirement plan practitioners (attorneys, accountants, actuaries and others) this newsletter presents detailed information to help you with retirement plans.

Retirement Plans web page (www.irs.gov/ep) -- The IRS has a helpful Web site filled with lots of plain-language information to help you with retirement plans at www.irs.gov/ep. Once there, click on Benefits Practitioner; Plan Participant/Employee; or Plan Sponsor/Employer.

Order products today by calling 800-829-3676 or by visiting www.irs.gov/ep. Retirement Plans Questions: Call 877-829-5500

