Qualified Plans & Features ©

Objective: This half day course is offered as a stand-alone program, or as part of a full-day course, when combined with **"Keeping Your Plan Qualified"**. This course provides an overview of the employee benefit plan design landscape, introducing participants to retirement, health & welfare, non-qualified, non-profit, OPEB, and fringe benefit plans. Participants will learn to identify the difference between qualified and non-qualified plans and will be introduced to the concept of total rewards employee benefit design.

What you will learn:

- Overview of qualified retirement plans, including defined benefit, defined contribution, hybrid/cash balance, employee stock ownership, and profit sharing plans

- Overview of qualified health & welfare plans, including medical, pharmaceutical, dental, vision, life insurance, high deductible health, dependent care, health & dependent care reimbursement, disability, and cafeteria plans

- Overview of non-qualified plans, including equity-based compensation, cash incentive compensation, and deferred compensation plans

- Overview of non-profit and governmental entity deferred compensation plans, including 403(b) and 457 plans

- Selection of retiree medical benefit plans and features, including VEBA trusts, healthcare stabilization funds (401(h) accounts), government fund and grantor trusts, and retiree health savings accounts

- Development of fringe benefit programs and employee reimbursement arrangements (and the related deductibility issues)

CPE: 4 Hours

Level: Basic

Category: Tax - Employee Benefits

Prerequisites: None

Instructor: Jason Sheffield

Code: QPAF