

EGTRRA Restatement Time Has Arrived!

IRS regulations require periodic restatements of qualified retirement plans to reflect all new changes in the law.

Following are some questions you may have...

“Restatement” — What does it mean?

Amendments and tax law changes are incorporated into existing qualified retirement plans through new plan documents.

Must my plan be restated?

Yes — this is an IRS requirement to maintain the tax-qualified status of all qualified retirement plans in the U.S.

Wasn't this just done recently?

The last restatement (referred to as “GUST”) was completed between 2001 and 2003.

When will this restatement take place?

The IRS requires that restatements be completed by April 30, 2010. Randall & Hurley, Inc. is currently working on this project and our goal is to be finished by the end of 2009.

What do I have to do?

Right now — nothing.

Randall & Hurley, Inc. will keep you updated as more information becomes available. If you are considering making any changes to your Plan in the near future, we can include the change in the document restatement without any extra charge. Call your Consultant and ask that your EGTRRA Restatement be prioritized and include your changes.

Meeting needs with innovative technology.

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