

Compensation Planning Portfolios Library

Expert guidance and resources for effective pension, benefits, and deferred compensation planning.

Written by leading experts in this constantly evolving practice area, the *Compensation Planning Portfolios* provide everything tax practitioners need to develop strategic plans, research, and answer day-to-day compliance questions.

Format & Frequency

Available online, with e-mail highlights and breaking news. Print Portfolios available.



Benefits

- Create complete benefit plans and disclosure documents in less time using customizable, ready-to-use samples.
- Turn complex issues into easy-to-understand issues with the analysis and experience-backed guidance of leading tax and ERISA practitioners.
- Stay up to date on news and developments.
- Find answers to everyday compensation and benefits planning and compliance questions.

Expert Analysis

Coverage includes:

- Age, Sex, and Disability Discrimination
- Cafeteria Plans
- Cash or Deferred Arrangements
- Compensating Employees with Insurance
- Employee Benefits for the Contingent Workforce
- Employee Fringe Benefits
- Employee v. Independent Contractor
- ERISA Reporting, Disclosure, and Fiduciary Requirements
- ESOPs

- Estate and Gift Tax Issues
- Golden Parachutes
- IRAs, SEPs, and SIMPLEs
- Multi-Employer Plans
- Nondiscrimination/Permitted Disparity
- Pension Planning and Accounting
- Plan Selection and Qualification
- Reductions in Force
- Restricted Property
- Specialized Qualification Plans
- Stock Options
- VEBAs and Other Self-Insured Arrangements
- Withholding, Social Security, and Unemployment Taxes

Practice Tools

Time-saving practice aids include:

- Tables, Charts, and Lists
- Working Papers (sample plans, documents, and more)
- Client Letters
- Federal Tax Forms*
- State Tax Forms*

Source Documents

You'll find only the most accurate, official sources cited here:

Laws and Regulations

- Internal Revenue Code
- Treasury Regulations
- Proposed Regulations
- Tax Legislation

Agency Documents

- Treasury Decision Preambles
- IRS Documents
- IRS Publications
- Circular 230
- CIPs/ISP Papers

Cases

- Federal Tax Cases
- Tax Court Rules
- Court of Federal Claims Rules

News & Commentary

- *Compensation Planning Journal*
- *Weekly Report*
- *BNA Insights*
- *Tax Management Memorandum*

*Optional