

Technical Answer Group

The resource for your pension-related questions

Direct, personal answers to your pension-related questions in one business day

The Technical Answer Group (TAG) is a team of specialists with an average of more than 25 years of experience, who respond to hundreds of technical questions submitted by pension professionals each day. In addition to answering your questions within one business day, TAG gives you links to primary source materials, an extensive database of previously asked questions, industry and legislative news updates and much more.

How TAG works

E-mail your questions to a technical representative, and you'll receive a response within one business day—it's that simple! You can rest assured that TAG answers are accurate and reflect current legislation.

TAG has been absolutely GREAT!! Your service gives us the ability to respond to technical issues so much quicker than we were ever able to before.

—CPI Qualified Plan Consultants, Inc.

Wolters Kluwer Law & Business

5th Annual fwilliam.com Customer Conference will be August 17-19, 2016 at the Fairmont Millennium Park Hotel in downtown Chicago.

Search TAG Q & A Our Promise

New TAG Stuff Previous 3 Weeks Frequently Asked Questions Resource Center

Articles & Research

- TAG Training Demo
- Glossary
- Government Reports & Related Studies
- Surveys, Statistics & abstracts

Internal Revenue Resource

- Internal Revenue Code
- Treasury Regulations
- Field Service Advice
- General Counsel Memorandum
- IRS Legal Memorandum
- Internal Revenue Manual
- IRS Announcements
- IRS Forms
- IRS News and Bulletins
- IRS Notices
- IRS Publications
- List of Required Modifications
- Letter Rulings
- Revenue Procedures
- Revenue Rulings
- Information Letters
- Quality Assurance Bulletins
- Tax Treaties
- Employee Plans Examination Guidelines

Quick Reference

- Covered Compensation Tables
- Approved Non bank Trustees
- EGTRRA Highlights
- Forms
- Glossary
- HCE Determination Historical Limits
- NAICS Codes
- New TAG Subscribers
- Plan Comparison & Summary
- Rollover Chart
- Summary of Prop. Regs RE: ERISA 204(h)
- Benefit & Contribution Limits
- Published Rates
- Spreadsheets & Calculators

Department of Labor Resource

- Amicus Briefs Under ERISA
- Advisory Opinions
- ERISA Regulations
- Interpretive Bulletins
- ERISA Act Sections
- DOL Information: General
- Prohibited Transaction Exemptions
- Publications
- Field Assistance Bulletins
- Notices - Federal Register Documents
- 5500 Reporting
- Voluntary Correction Programs
- Abandoned Plan Program

PBGC Resource

- PBGC Regulations
- PBGC Technical Updates
- PBGC Forms
- PBGC Interest Rates
- PBGC Press Releases
- PBGC Opinion Letters
- PBGC Publications
- Pension Insurance Data Books
- Final Rules

2011 2010 2009 2008 2007 2006 2005 2004 2003 2002 2001 2000 1999 1996 1995 1994 1993 1992 1991 1990 1989 1988 1987 1986 1985 1984 1981 1980 1979 1978 1977 1976 1975 1974 Pre-1974

Choose from more than 50 categories

Submit a Question to TAG

Please submit any changes to your contact information in a separate request.

Name: Janeen Kopale

Company: Wolters Kluwer Law & Business

Telephone: 888-358-9720

Email: janeen.kopale@wolterskluwer.com

Overview:

Relevant Background Information:

Specific Questions:

Urgency: Next Business Day

CC Yourself: Yes, send a copy of the question to my email?

Submit Question

E-mail your question and receive a response in one business day or less

To order, or for more information, call your Sales Representative at 1-877-605-2179 or visit tagdata.com



In addition to direct access to specialists, your TAG subscription delivers...

New TAG Stuff

New TAG Stuff includes daily updates and late-breaking news concerning the DOL, IRS, PBGC and other industry sources. Each day's New TAG Stuff is e-mailed to you. Missed an update? Check the New TAG Stuff archive, which contains the current three weeks as well as the past three weeks of New TAG Stuff.

TAG FAQs

Search a robust database of over 4,000 previously and frequently-asked questions from other pension professionals to find accurate, immediate answers to your questions related to:

- 401(k)
- 403(b)
- Defined Benefit
- ESOP
- IRA
- QDRO
- Rollovers
- Top Heavy Issues
- Plan Document Issues
- Mergers and Acquisitions
- Vesting and Forfeitures
- ... and many more

You can search by keyword or phrase, by category or search the entire database of frequently asked questions.

Articles & Research

Are you tired of sifting through traditional news mediums to find industry news? Access thousands of current and archived articles pulled from hundreds of sources and ensure you are in-the-know.

Internal Revenue Resource

This section provides source documents from the IRS. Everything is categorized in a format that makes it easy to locate the information you need. Document topics include:

- Internal Revenue Code
- Treasury Regulations
- General Counsel Memorandum
- IRS Legal Memoranda
- Internal Revenue Manual
- IRS Announcements
- IRS Forms

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Enter your search terms below. Separate distinct phrases with a comma or semicolon

Search

Current Category Selected Categories Entire FAQ [Advanced Search](#)

Welcome to TAG's "Question & Answer" database

Welcome to TAG's "Question & Answer" database. Please select your category from the left or search the entire Q&A database. Every week we add new questions to the database. Maybe you'll see one of your questions. As always, if the answer you searched for is not available, please [SUBMIT A QUESTION TO TAG.](#)

To select a category to browse or search, click on the title of that category in the list on the left. Use the check boxes to select multiple categories when performing a search.

Find your answer within a previously answered question by searching within a category—or search the entire FAQ at once.

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- IRS News and Bulletins
- IRS Notices
- IRS Publications
- Required Modifications
- Letter Rulings
- Revenue Procedures
- Revenue Rulings
- Tax Treaties
- ... and much more

Quick Reference Tools

Here you'll find helpful and easy-to-use tables, charts, spreadsheets and information—all in one place. Need to verify who is a highly compensated employee? Use our chart and find out in a matter of seconds. Need to know what the taxable wage base was in 1984? We have all of the pension limits listed since 1975!

Department of Labor Resource

Obtain documentation related to:

- Advisory Opinions
- Interpretative Bulletins
- ERISA Act Sections
- General DOL information
- 5500 Forms
- Prohibited Transaction Exemptions
- ... and much more

PBGC Resource

Retrieve data on PBGC regulations, technical updates, interest rates, press releases and opinion letters.

Court Cases

Access cases sorted by year dating back to 1974, cases dating before 1974, proposed legislation dating back to 1997 as well as enacted laws.

Using TAG as a technical resource saves us hours and hours of research time every year. TAG always provides the back-up information as well for their answers so we know the source and can rely on the accuracy of TAG's answers.

—Sheffler & Martin, Inc.

To order, or for more information, call your Sales Representative at 1-877-605-2179 or visit tagdata.com

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