



New Year's Resolutions for Benefit Professionals

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Highlights

- **Save for a Rainy Day:** Evaluate and consider amending 401(k) hardship provisions
- **Clear Out the Cobwebs:** Check DB plan actuarial assumptions for reasonableness
- **Ask for a Raise:** Avoid deduction limitations under Code Section 162(m)
- **Get in Shape:** Ensure wellness plans are not impacted by new EEOC guidance
- **Get a Checkup:** Check your Health Plan for common pitfalls
- **Clean Your Closets:** Review your qualified retirement plans for compliance concerns
- **Get Organized:** Act on, don't just file away, your plan's service provider's 402(b)(2) disclosures
- **Eat Better:** Your employer is more likely to reimburse a meal IF it can deduct it

January 2019 Alert