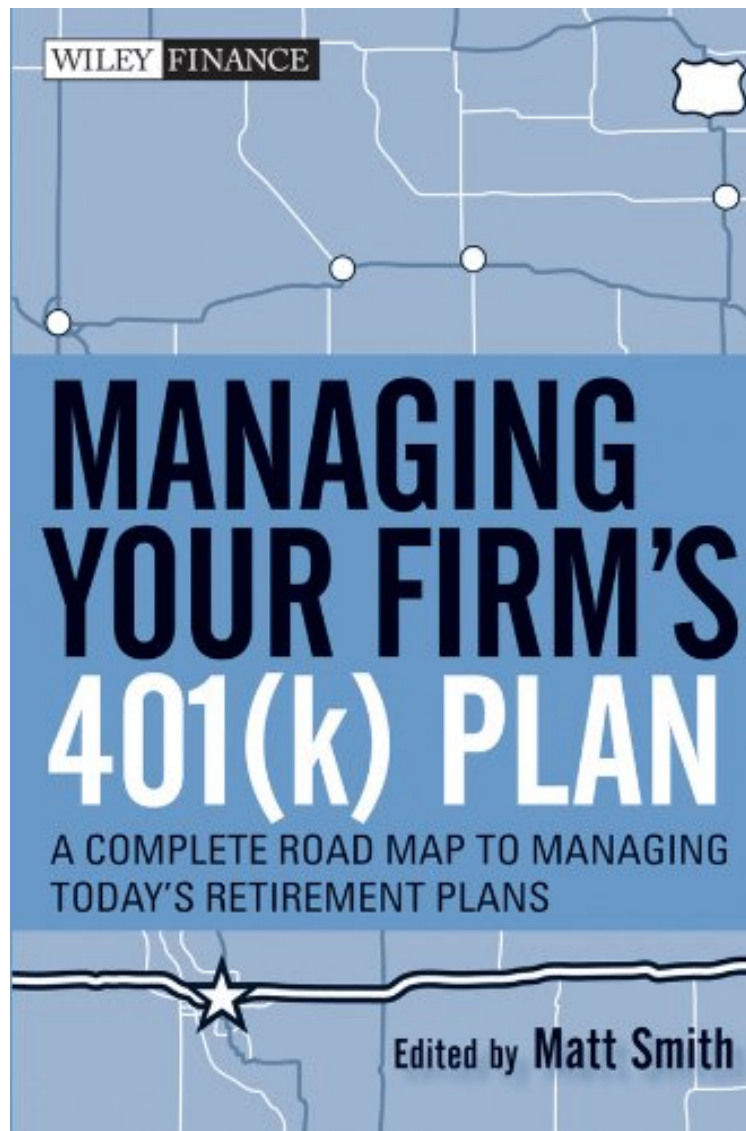


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Managing Your Firm's 401(k) Plan: A Complete Roadmap to Managing Today's Retirement Plans (Wiley Finance)

Matthew X. Smith

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Matthew X. Smith : Managing Your Firm's 401(k) Plan: A Complete Roadmap to Managing Today's Retirement Plans (Wiley Finance) before purchasing it in order to gage whether or not it would be worth my time, and all praised *Managing Your Firm's 401(k) Plan: A Complete Roadmap to Managing Today's Retirement Plans* (Wiley Finance):

An objective resource for managing your firm's 401(k) plan With the recent uncertainty in the economy and financial markets, 401(k) plans are now under more scrutiny than ever. Written for finance and benefit professionals who are responsible for the management, operations, or oversight of their company's 401(k) plan, *Managing Your Firm's 401(k) Plan* offers a guide to designing and managing a 401(k) with a focus on financial, fiduciary, and regulatory standards. While there are plenty of books on 401(k) plans written for the individual investor, there are very few resources for professionals involved in 401(k) management. This book effectively fills that void. It was specifically written for professionals involved in 401(k) management. It includes regulatory and fiduciary information needed for compliance purposes. It was created by experienced experts in the defined contribution plan arena. Topics covered throughout this insightful guide include measuring retirement readiness, establishing plan governance, managing the plan's investment menu, monitoring record keeper performance, communicating effectively with employees, helping participants manage their retirement income, and much more.

From the Back Cover
Praise for *Managing Your Firm's 401(k) Plan* "Managing Your Firm's 401(k) Plan provides an excellent source of information on 401(k) plan administration that both retirement specialists and human resources generalists will find extremely valuable. This book will prove to be an indispensable resource in any HR department library." —E.W. Lee Achord, CEBS, Vice President, Talent Management Benefits Administration, Wackenhut
401(k) plans hold trillions of dollars of retirement wealth in America. What started as a way to save a little extra money for retirement has now turned into a critical source of security for millions of people. This field has become a serious business, especially for the thousands of corporate officers and finance and human resource professionals that are relied upon to effectively design or manage their firm's 401(k) plan. Written to assist finance and benefit professionals in becoming better informed consumers of plan services as well as empowered managers of their firm's 401(k) plans, this reliable resource puts the operation, oversight, and management of 401(k) plans in perspective, and focuses on the financial, fiduciary, and regulatory issues associated with it. Filled with in-depth insights and expert advice, *Managing Your Firm's 401(k) Plan* offers unparalleled guidance on establishing effective governance practices, avoiding simple compliance errors, and maximizing plan design. Along the way, it also answers important questions, including what is your role in helping employees reach a secure retirement and what types of risks are you assuming? Accessible and informative, *Managing Your Firm's 401(k) Plan* presents an objective overview of this vehicle and offers practical insights on its role in today's organization. Managing a 401(k) plan is not an easy task, yet each year, thousands of corporate officers and finance and human resource professionals are relied upon to effectively design or manage their firm's 401(k) plan. In this role, the decisions they make will have a meaningful effect on the retirement wealth of their co-workers. Nobody understands this better than Matt Smith, and now, with *Managing Your Firm's 401(k) Plan*, he focuses on the financial, fiduciary, and regulatory issues associated with 401(k) plans to help finance and benefit professionals become better informed consumers of plan services as well as empowered managers of their firm's 401(k) plans. In addition to this information, Smith and his expert contributors at Aon Consulting help you answer fundamental questions such as: What is your role in helping employees reach a secure retirement? How does your plan design affect participant decision? What kinds of risks are you assuming? Other issues addressed along the way include: The employer's role in the 401(k) plan Establishing 401(k) plan governance Managing the 401(k) plan's investment menu Monitoring record keeper performance Communicating a 401(k) plan effectively with employees Helping participants manage their retirement income And much more While there are plenty of books on 401(k) plans written for individual investors, there are very few resources for professionals involved in 401(k) management, operation, or oversight. This book fills that void by helping you excel in plan design, establish effective governance practices, and avoid simple compliance errors.
About the Author
MATT SMITH is Senior Vice President, National Defined Contribution Practice Leader, for Aon Consulting in the United States. Prior to his role at Aon, he was managing director of retirement services for Russell Investments. Smith has been involved with the design, implementation, administration, and asset management of defined contribution plans for over twenty-five years. He has written and spoken widely on topics involving defined contribution plans. Smith has been quoted by numerous trade and professional publications, including *Plan Sponsor*, *Employee Benefit News*, and *Pension Investments*.