

## OGLETREE QUALCHECK™ SAFEGUARDING YOUR RETIREMENT PLAN

Keeping a retirement plan in compliance with the baffling array of complex and ever-changing tax requirements has never been easy for employers, and the cost of errors can be high. For years, the Internal Revenue Service (IRS) has made this task a bit easier by periodically giving its seal of approval—a favorable determination letter—to compliant plan documents and amendments, but no more! The last round of official IRS determination letter reviews for most plans concluded in January of 2017, leaving employers to fend for themselves with a few limited exceptions. To help employers meet this new obligation, Ogletree Deakins is proud to announce Ogletree QualCheck™, a program designed to provide employers with a means to determine whether their plan documents contain the provisions needed to satisfy the formal requirements for qualification under the Internal Revenue Code and related regulatory and administrative requirements.



Ogletree QualCheck™ will serve as an invaluable addition to any employer's compliance toolbox, providing confidence that the form of a retirement plan remains consistent with new laws and regulations. Ogletree QualCheck™ is staffed by experienced benefits lawyers, each of whom possesses in-depth technical and practical knowledge about required and "best practice" retirement plan provisions. In addition, all plan evaluations are peer-reviewed for accuracy and completeness. Finally, Ogletree QualCheck™ services are provided on a timely and cost-effective basis regardless of plan size or design. At the conclusion of the Ogletree QualCheck™ review process, an employer will receive a formal opinion from Ogletree Deakins regarding the plan document's tax-qualified status and, if applicable, a summary of key compliance issues for further discussion.

For more information about how Ogletree QualCheck™ can help you maintain the tax-qualified status of your retirement plan document, please contact the Ogletree Deakins attorney with whom you normally work or contact us at [Ogletree.QualCheck@ogletreedeakins.com](mailto:Ogletree.QualCheck@ogletreedeakins.com).

