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Nota di contenuto	A MANAGER'S GUIDE TO STRATEGIC RETIREMENT PLAN MANAGEMENT; CONTENTS; ACKNOWLEDGMENTS; Chapter 1: Introduction; Overview of Retirement Plans; Chapter 2: The Basics of Retirement Plans; Why Have Retirement Plans in the First Place?; Overview of Plan Design Types; Defined Benefit Plan; How Does a Plan Sponsor Choose Between a Career Average Pay Formula versus a Final Average Pay?; Defined Contribution Plan; Nonqualified Plans; Chapter 3: Administration; Roles and Responsibilities; Examples; Vendor Management; Chapter 4: Fiduciary Duty; Fiduciary Basics; Fiduciary Setup- Case Study Chapter 5: FinancialDefined Benefit Concerns; Defined Contribution Concerns; Chapter 6: Human Resources; Human Resources Issues; Adequacy; Focus: The Defined Benefit versus Defined Contribution Argument- Where Do You Want to Target Dollars?; Targeting Your Retirement Dollars; Plan Design Modeling; Competitiveness; Relationship to Total Compensation; Special Employee Groups- Executives and Unions; Employee Perspective; Investment Risk; Longevity; Health; Summary of Risk; Benchmark- Current Status; Chapter 7: How to Hire the Right Consultants; Chapter 8: General

Trends

Asset-Based Solutions- Portable Alpha Globalization; Death of Defined Benefit Plans Followed by DB-ification of 401(k) Plans; Bundled Service Providers; Enterprise Risk Management; Demographics; Chapter 9: Where to Go for Help; Resources; Studies and Surveys; Appendix A: Company ABC- Request for Proposal: 401(k) Savings Plan; Company Background; Retirement Program Goals; Other Assumptions; Request for Proposal; Appendix B: Sample Traditional Request for Proposal; Plan Administration and Daily Valuation Record Keeping, Employee Communication and Education, and Trustee/Custodial Services Appendix C: Sample Defined Contribution Plan Investment Policy Statement XYZ 401(k) Retirement Plan Investment Policy; Investment Objectives; Initial Mutual Fund Selection Criteria; Ongoing Performance Measurement; Participant Education; Background; Plan's Financial Situation; Purpose; Assignment of Responsibility; Performance Objectives; Measurement of Performance; Investment Management Policy; Liquidity; Marketability of Assets; Investment Guidelines; Selection of Investment Managers; Delegation of Authority; Investment Manager Performance Review and Evaluation Appendix D: 401(k) Plan Investment Performance Review Appendix E: Replacement Ratio Study, A Measurement Tool for Retirement Planning; Appendix F: Selecting a Default Fund for a Defined Benefit Contribution Plan; Appendix G: Argus Consulting Ltd NGO Retirement Plan Survey-2005 Results; Demographics; Retirement Plans; Appendix H: Lessons From Behavioral Finance and the Autopilot 401(k) Plan; INDEX

Sommario/riassunto

""Daniel Cassidy has written a detailed, comprehensive guide for managers to understand and succeed at the ongoing process of managing a company retirement plan. If motivating your employees is important to you as a manager, this book is an essential key to your success.""--Josh Gordon, author of Presentations That Change Minds and Selling 2.0
Written by renowned retirement benefits planning specialist Daniel Cassidy, A Manager's Guide to Strategic Retirement Plan Management focuses on current best practices regarding company-sponsored retirement plans within the United States.<
