

PBP

PENSION & BENEFIT POWER

▶▶ **Content** supported by simple, comprehensive exposition of benefit options, plan designs and funding, investment choices for plan sponsors and participants, and compliance techniques. Articles and departments will evaluate current and proposed regulation and legislation affecting small business plan sponsors.

FUNDING

Experienced Practitioners

Combining more than 80 years of pension and benefit experience, Al Lurie and Sam Gilbert have their fingers on the pulse of the industry. From fast breaking news to in-depth analysis, their editorial content and guidance provide valuable and timely information to small business plan sponsors.

SOLUTIONS



Alvin D. Lurie, L.L.B. Editor-in-chief

Mr. Lurie, who is chairman of the Alsam Company and of The Lurie Group, is a member of the New York and District of Columbia bars and operates a law firm in New York. He has specialized in pension benefits and tax matters for 50 years and chaired bar association committees in those disciplines. Until 1978, he served as the Assistant Commissioner of Internal Revenue for Employee Plans and Exempt Organizations (the first person to occupy that post). He has been an adviser to the Vice President's Task Force on Regulatory Relief. Mr. Lurie is long-time chairman of the Special Committee on Pension Simplification of the New York State Bar Association, and is Special Counsel to the Small Business Council of America. He is the author of Lurie's Commentaries on Pension Design, Lurie's Guide to VEBAs, Collected Commentaries on Pension, and ESOPs Made Easy; and he has frequently written for financial, tax, and employee benefit periodicals, and lectured at tax and benefit seminars throughout the nation. He is a Charter Fellow of the American College of Employee Benefits Counsel and widely regarded as one of the prominent pension practitioners in the U.S.



Sam Gilbert Executive Publisher

Sam Gilbert is president of the Alsam Company and of United Plan Administrators, Inc., a pension consulting firm located in California which installs and performs administration for small business retirement plans. He is a participating member of major professional associations, including the American Society of Pension Actuaries and the National Institute of Pension Administrators. He is a member of the board of directors of the Small Business Council of America, and recipient of its 2001 Connie Murdoch Award for leadership and service to the privately owned business community in connection with federal tax legislation. The Presidential Candidate Employee Benefit Questionnaire was founded by Mr. Gilbert in 1984, which he continues to sponsor. Mr. Gilbert served as a delegate to the 2nd & 3rd National White House Conferences on Small Business, and as task force chairman for the implementation of pension investments in small businesses for the White House Conference. As a member of the United States Chamber of Commerce Small Business Counsel and the Chamber's Employee Benefits Committee, he now serves the dual role of representing small business employee benefit issues on both bodies.

MISSION STATEMENT

Solutions Empowering Small Business Plan Sponsors

The most efficient link between small business plan sponsors and employee benefit providers. Actionable, focused editorial content, in plain English, for small business owners and decision-makers, and for their third party administrators, financial planners and other professionals, regarding set-up, administration and investment of pension, health and other benefit plans, and regulatory compliance.

Pension & Benefit Power reports and evaluates:

- ▶ Benefits
- ▶ Government agency actions
- ▶ Latest legislation

Its editorial span includes:

- ▶ Plan investments,
- ▶ 401(k) plans, profit sharing and pension plans, ESOPs
- ▶ Health benefits, cafeteria plans, disability, long term care
- ▶ Insurance products (group, life, business)
- ▶ Executive compensation, stock options,
- ▶ Retirement planning
- ▶ Participant education/services
- ▶ Section 529 (tuition) plans

► FEATURES

►► **Comprehensive** articles providing plan sponsor insight into PBP's core editorial topics: retirement planning, health care providers and plans, and plan sponsor investment vehicles. In-depth Spotlights on significant current developments impacting plan sponsors, with analysis of effect to be anticipated on small business pension and benefit plans.

► DEPARTMENTS

In Every Issue

Topping Up for Executives

Time-tested practices and emerging or passing trends; combined pension and top-hat packages; tax, financial, accounting and policy implications for employer; retirement and estate planning considerations for business owners and fellow executives.

Fringes for All

Review of current developments affecting myriad benefits for rank-and file complementing or replacing traditional qualified plans.

Washington Seen

A regular department featuring: legislative and regulatory news from Washington relevant to the small benefit plan; recent statements and actions of people influencing government policy; congressional testimony; reactions and reports from the private sector; and credible rumors of impending developments on the Hill.

Managing Plan Money

Investments; monitoring; employee education.

Resource Guide

Reader resource guide, listing vendors or service providers that supply products or services within the scope of features and departments.



ANALYSIS

Occasionally

Health Care

On-going reviews of health care options and means of coping with escalating costs.

Administering Plans

Cost-saving techniques; legitimate plan expenses; new ideas for lifting the administration burden off small business owners.

Oyez, Oyez

Decisions in the courts, or pending actions, particularly pertinent to small business plans.

Heads Up

Flash bulletins on late-breaking legislation, agency announcements (published or imminent), and other important developments warranting immediate publication.

Our Vision

A unique opportunity which allows industry executives to author a one-page article defining their company's present positioning and future direction in the small business pension and benefit market. "Vision" enables industry firms to differentiate their company and its product offerings, and clearly state their position within the market.



POLICY

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