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Plans

The Department of the Treasury and the Internal Revenue Service have issued guidance for employers and employees with terminating 403(b) plans that fund benefits through 403(b)(7) custodial accounts. The guidance reflects changes provided in the ...

Nov. 10, 2020



IRS

Department of the Treasury Internal Revenue Service

The Department of the Treasury and the Internal Revenue Service have issued guidance for employers and employees with terminating 403(b) plans that fund benefits through 403(b)(7) custodial accounts. The guidance reflects changes provided in the Setting Every Community Up for Retirement Enhancement Act of 2019 (SECURE Act).

[Revenue Ruling 2020-23](#) provides that 403(b) retirement plans funded through

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