



March 2018

Getting on the Same Page: Compensation and Performance Management

Pay for performance can be a powerful tool to improve an organization's ability to retain top performers and drive organizational goals and objectives. It is important that the plan be properly designed and communicated to employees to maximize its impact on the organization.

The Best Leaders Are Humble Leaders

The stereotypical traits of leaders would include appealing personality, charm, having vision, being enterprising or bold, among other descriptions of powerful individuals. However, humility is high on the list of traits among effective leaders. As you develop your own leadership skills, or those of your staff, here are some key skills to evaluate.

Tax Reform Decreases 2018 HSA Contribution Limit

On March 5, 2018, the IRS modified certain 2018 cost of living adjustments (COLAs) to reflect the changes made by the Tax Cuts and Jobs Act.

Total Rewards Statements Defined

Total Rewards Statements include the total value of what employers are providing to their employees, whether it be medical benefits, compensation arrangements, or bonuses.



Are You Living the Culture Your People Expect?

In order for an organization to succeed, its members must feel safe to protect, innovate, and renovate. Leaders must make sure that the organization is living the culture it promotes.

Transitioning to Tax Reform for Pension Plan Sponsors

The transition to tax reform presents a one-time opportunity to implement borrow-to-fund and de-risking strategies that produce significant after-tax savings and other benefits to the company.

Retirement Savings Opportunities for High Earning Owners and Professionals

Why choose a Cash Balance Plan?

- ✓ Build wealth and retirement savings
- ✓ Much greater contributions than through a 401(k) plan alone
- ✓ Save on federal, state, and local taxes
- ✓ Protect substantial assets from creditors or legal action
- ✓ Provide attractive benefits for non-owners
- ✓ Attract and retain talented employees
- ✓ Ability to roll over lump sum distributions to an IRA or successor plan

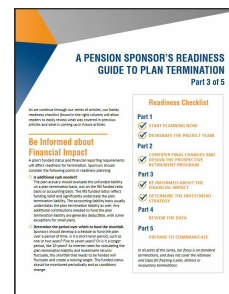
For successful small businesses, a 401(k) plan combined with a cash balance plan can provide opportunities to build wealth, save for retirement, save on taxes, protect assets, attract and retain employees, and enhance financial well-being.

DC Plan Sponsors Looking for Missing Participants: Help is on the Way

Missing participants are a constant thorn in the side of retirement plan sponsors. Sponsors and recordkeepers alike struggle to establish effective processes to minimize the number of missing participants and uncashed checks and to conduct fruitful searches to reconnect the two.

Pension Plan Termination Part Three—Be Informed About Financial Impact

A plan's funded status and financial reporting requirements will affect readiness for termination. Sponsors should consider all financial aspects as well as determine an investment strategy.



Upcoming Events

Managing Fiduciary Risk & Liability in 401(k) & 403(b) Plans, March 26, Brentwood, TN, Jason Rothman panelist

NAPA 401(k) Summit, April 15, Nashville, TN

NCEO Employee Ownership Conference, April 19-20, Atlanta, GA

Michigan HR Day, April 12, Lansing, MI - Visit our booth

- Wait...We're Acquiring What?!? Best HR Practices for Mergers, Acquisitions, and Divestitures, presented by Kimberlie England and Miriam Batke
- Elimination or Revolution: Taking Performance Reviews to the Next Level, presented by Tara Morey and Jen Givens

Retirement, Employee Benefits and Healthcare Forum, April 19, Columbus, OH

- Changes in Healthcare Delivery, presented by Steve Parsons, Findley Davies | BPS&M and Steve Cindrich, OhioHealthy Medical Plan
- Creative Compensation Strategies for Today's Workforce, presented by Jeanette Kopmanis, Findley Davies | BPS&M
- Tax Reform and Form 5500 News, presented by Jason Lumpkin, Schneider Downs and Jason Rothman, Findley Davies | BPS&M

OACUBO Annual Meeting, April 25-27, Ashland, OH - Visit our booth

IHRIM Talent Event, July 9-10, Cleveland, OH - Proud sponsor

Quick Links

2018 LIMITS FOR HSAs & HDHPs	FEBRUARY 28 PENSION INDICATOR	2018 EMPLOYEE BENEFIT PLAN LIMITS
WEBSITE	SERVICES	KNOWLEDGE



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