



May 2018

Welcome to Our New Brand Publication Findley Focus

Findley Focus is published monthly with retirement, benefits, compensation, and change management topics and everything in between. Findley has also launched a new subscription form giving you the opportunity to select the topics of most interest to you.

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Evaluating Near-Site and Onsite Clinics

As onsite and near-site clinics continue to operate and grow in popularity, the question becomes, are they performing according to client expectations?

HSA Contribution Limit for 2018 Returns to \$6,900

Plan sponsors should immediately take action to notify HDHP participants of the 2018 HSA contribution limit, so individuals can plan accordingly.

High-Performing Wellness Initiative Best Practices

Developing a well-being strategy that empowers people to lead healthier lives and helps the organization to achieve objectives such as lowered health care cost, increased productivity and engagement, and enhanced financial

results.



The Practical Cash Balance Plan: Choosing Your Plan's Interest Crediting Rate

When the IRS expanded its list of permissible interest crediting rates to include the actual portfolio return, there was a good amount of interest in implementing this intuitive approach. However, achieving all of the common objectives with a cash balance plan has caused the more conservative, fixed rate or fixed income index interest crediting rates to be the popular choice.

Executive Compensation Planning for Owner Executives of Private Business after Tax Cuts and Jobs Act

The new tax laws have created opportunities for private businesses—reducing tax rates and creating investment incentives; however, there are a few challenges. This article will review the complexities for planning executive compensation for owner executives of private companies after the Tax Cuts and Jobs Act (Tax Act).

2019 HSA/HDHP Limits

Plan sponsors should ensure that all participant communications for the 2019 plan year reflect the new limits.

Affordable Care Act PCORI Fee Payments Due July 31st

For self-insured plans, the plan sponsor (generally the employer) is responsible for paying the Patient-Centered Outcomes Research Institute (PCORI) fee.

2018 DB and DC Plan Compliance Calendars

These helpful resources provide deadlines and detail for plan sponsors to easily keep track of their responsibilities.

[2018 Defined Benefit Plan Compliance Calendar](#)

[2018 Defined Contribution Plan Compliance Calendar](#)

2018 Compliance Calendar
Detailed Benefit Plans

The year ends December 31, 2018

Month	1	2	3	4	5	6	7	8	9	10	11	12
January 2018												
February 2018												
March 2018												
April 2018												
May 2018												
June 2018												
July 2018												
August 2018												
September 2018												
October 2018												
November 2018												
December 2018												

January 2018

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February 2018

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March 2018

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FINDLEY

When Selecting HR Technology, Don't Rule Out the RFP Process

HR Technologist, May 15, 2018. Tara Morey shares tips to manage the HR technology selection process. One of the best practices for saving time and money is a strategic RFP process that helps companies focus on the bottom line.

A Pension Sponsor's Readiness Guide to Plan Termination: Part 4

This fourth article in Findley's five part series provides insights into the participant data review process. Our diagram will help you assess the condition of participant data.



Upcoming Events

- OSBA ERISA Fiduciary Overview Webcast, May 23, Jason Rothman to present**
- The ESOP Association Conference, May 24-25, Washington, DC**
- 2018 SHRM MidSouth Compensation Symposium, June 8, Nashville, TN**
- SHRM18 Annual Conference, June 17-20, Chicago, IL**
- Perspectives on Retirement Plan Fiduciary Risk, June 19, Charlotte, NC**
- IHRIM Talent Event, July 9-10, Cleveland, OH - Proud sponsor**

Quick Links

<p>2019 LIMITS FOR HSAs & HDHPs</p>	<p>APRIL 30 PENSION INDICATOR</p>	<p>2018 EMPLOYEE BENEFIT PLAN LIMITS</p>
<p>WEBSITE</p>		<p>INSIGHTS</p>



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