

Employee Plans Customer Education & Outreach

Talking Points

October 2006

New Examinations Communication Tools: First is the [Employee Plan Audit Efficiency Guide](#) – Developed by a team of practitioners and Employee Plans managers, is meant to ease the communication between yourself and the taxpayer. The guide will be completed jointly by the agent and the taxpayer.

The next item is [Top Ten Tips to Prepare for an Efficient Audit](#). This listing will provide you with ways to prepare for the examination of the plan and trust. Each tip comes with detailed explanations to assist you in getting the necessary items ready for the examination.

New Web Look: The refreshed topics for the "[Benefits Practitioners](#)" segment page and the new [site map](#) (under "More Topics") have been posted. Based on comments received from ACT members and others, we made appropriate enhancements to regroup items to provide easier navigation of our web page.

New Facts: Sorry, make that FAQs, have now been posted regarding [Hardship Withdrawals](#) and [Loans](#). These are located in the EP compilation of [Frequently Asked Questions \(FAQs\)](#) – check them all out!

[Fall 2006 Edition of Employee Plans News](#) - This edition features articles on: the recent change in EP's Leadership – Carol Gold's and Michael Julianelle's departure and Joseph Grants promotion), Interview with Karen Justesen (EP Field Actuaries Group Manager), Critical Fewpoints...by Michael Julianelle (re: Place of Audit), Gust Applications, Recent EP Guidance Releases, PBCD Insights, 2006 Form 5500 Release, Latest EP Products Profile, and many more useful items of news and tips.

This edition also highlights the operating priorities of the [FY 2007 EP Work Plan](#) as it applies to Exam, Rulings & Agreement and CE&O. The article wrap up with a link to the actual Work Plan itself.

Check out the latest edition at www.irs.gov/ep by selecting "Newsletters" under the "Retirement Plans Community Topics" section. Want to receive e-mail notification of issued editions? Please subscribe on-line.

Updated Publication Available – The updated Publication 4050, [Retirement Plan Correction Programs CD-ROM](#) is now available. Go ahead and take one with you.
