



Employee Plans News

December 14, 2023

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IRS Meeting for Pre-approved Plan Providers and Mass Submitters

The IRS is hosting a virtual meeting with pre-approved plan providers and mass submitters to discuss technical and procedural requirements for the upcoming **4th cycle 401(a) defined contribution pre-approved plan submission period**.

When: Wednesday, January 17, 2024
12:00pm – 1:30pm Eastern Time

Who should attend: This meeting is intended for those providers and mass submitters who draft pre-approved plans and plan to apply for a 4th cycle opinion letter under Revenue Procedure 2023-37. We anticipate this meeting will be mutually beneficial for the providers, mass submitters, and the IRS.

How to register: Please send an email to Cameron.R.Kalchert@irs.gov by January 8, 2024, if you're interested in attending and we'll provide you with instructions for joining the meeting.

IRS Updates and Combines Procedures for Pre-Approved Plans

The IRS released [Revenue Procedure 2023-37](#), which consolidates prior procedures into this revenue procedure to conform, clarify and update the rules. Rev. Proc. 2023-37 describes the cycle system, plan provider application procedures, and the determination application rules for adopting employers.

Find answers to many of your retirement plan or IRA questions at [IRS.gov/Retirement](https://www.irs.gov/Retirement).

If you need help with an account-specific question, basic information about retirement plan forms or the status of pending applications, call our Customer Account Services at 877-829-5500.

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