When you have to be right

Technical Answer Group (TAG)

Direct answers to your ERISA and retirement research questions.

The Technical Answer Group (TAG) is a team of specialists, with an average of more than 25 years of TPA practice and pension experience, who respond to hundreds of technical questions submitted by pension professionals each day with relevant citations included. TAG also provides you with links to primary source materials, access to an extensive database of more than 3,500 previously asked questions, quick reference tools, charts, industry and legislative news updates, and much more all within one dashboard.

Highlights

- Submit a Question to TAG
- Frequently Asked Questions (FAQ) Database
- Practice Tools
- TAG Daily News
- Pension & Employee Benefits Treatises
- Agency Materials
- Rules & Regulations
- Laws & Statutes
- Archives – Law
- Cases (with archives back to 1960)

“Others may “Google” it, but I “TagData” it! I can almost always find what I need in the FAQ section, but if I don’t, submitting a question is easy and the answers are prompt and thorough. I love the TagData sense of humor that sometimes makes an appearance in communications. It lightens up sometimes tedious, complicated research.”

– Cathy Wells
Carr, Riggs & Ingram, LLC
How to Submit a Question to TAG

Type your question and any additional relevant background information into the “Submit a Question” widget and instantly submit your question to our team of specialists!

3,500+ Frequently Asked Questions (FAQ) Database

Search the entire TAG Dashboard, including government source documents and optional treatises, or only the TAG FAQ database via a specialized search widget – which provides quick access to approximately 3,500 previously and frequently-asked questions from other pension professionals. You can search by keyword or phrase, and by topic selected or the entire FAQ database.
Practice Tools

Here you’ll find helpful and easy-to-use tables, charts, spreadsheets and information—all in one place. Need to verify who is a highly compensated employee? Use our chart and find out in a matter of seconds. Need to know what the taxable wage base was in 1984? We have all the pension limits listed since 1975!

• Catch-up Contribution Worksheet
• Controlled Group Spreadsheet
• Covered Compensation Tables
• HCE Determination by Year
• Historical Limits
• Plan Comparison & Summary
• Self-Employed Worksheet
• CCH SmartTool: Benefit Facts & Figures
• Glossary of Pension Terms
• Maximum Loan Amount Calculator
• Plan Distribution Rollover Decision Tree
• SIMPLE 401(k) and other Plans Comparison Chart
• State Pension Distribution Withholding and Reporting Compare

Pension & Benefits Treatises

More than 50 industry-leading Wolters Kluwer Pension and Benefits authoritative treatises are fully integrated and available on the TAG Dashboard (additional fees apply), including Pension Answer Book, 401(k) Answer Book, and 5500 Preparer’s Manual.
TAG Daily News
Daily email updates and late-breaking news concerning the DOL, IRS, PBGC, and other industry sources. Missed an update? Check the TAG news archive, which contains the current three weeks as well as the past three weeks of news.

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Agency Materials
- IRS Notices
- IRS Revenue Procedures
- IRS Revenue Rulings
- Forms & Instructions
- IRS Publications
- DOL Opinion Letters
- Executive Orders

Rules & Regulations
- ERISA Regulations
- Federal Tax Regulations
- IRS Notices of Proposed Rulemaking
- Treasury Decisions
- Treasury Department News Releases

Laws & Statutes
- Committee Reports
- Constitution of the United States
- Enacted Laws
- ERISA Law
- Internal Revenue Code
- Other Federal Pension Laws and Regs

Cases
- Pension and Welfare Benefit Cases (archive back to 1960)
- U.S. Tax Cases
- U.S. Tax Court Regulars

Visit tagdata.com or call 1-800-596-0714 to learn more.