

MEMO# 2509

January 31, 1991

REVISED PUBLICATION 571 AND FORM 5307 INSTRUCTIONS

January 31, 1991 TO: PENSION MEMBERS NO. 4-91 RE: REVISED PUBLICATION 571 AND FORM 5307 INSTRUCTIONS

Attached is Publication 571, Tax-Sheltered Annuity Programs for Employees of Public Schools and Certain Tax-Exempt Organizations, which was recently revised. Although the publication was revised, it was not updated except for a brief statement to this effect on page one together with instructions to call the Internal Revenue Service if the publication does not answer all 403(b)-related questions. Also attached are the instructions to Form 5307, Application for Determination for Adopters of Master or Prototype, Regional Prototype, or Volume Submitter Plans (Other than Collectively Bargained Plans), which were revised this month for use with Form 5307 as revised February 1990. (See Institute Memorandum to Pension Members No. 15-90, dated April 10, 1990.) We will keep you informed of developments. W. Richard Mason Assistant General Counsel Attachment

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