



ERISA and Pension Plans

Course Description

This course focuses on the Employee Retirement Income Security Act, better known as ERISA. It covers the rules governing retirement accounts, welfare plans, and other employee benefits. The course looks at the employer's responsibilities under ERISA and the nuts and bolts of ensuring the compliance of qualified plans with federal regulation.

Course Learning Outcomes

At the completion of this course, students will be able to:

- Describe ERISA's history and purpose
- Describe ERISA's structure and application, including the fiduciary duties it establishes
- Analyze the treatment of qualified retirement plans under ERISA
- Differentiate between the types of retirement plans that ERISA covers
- Explain how ERISA applies to health insurance plans and other employer-sponsored benefits related to the health and welfare of employees

Final Exam

Grades and credit recommendations are based solely on a final exam. When students are ready to take the final exam, they should register for a LawShelf account (or simply log in, for those with existing accounts). Go to the video-course page and click "Take the Final Exam" and pay the exam fee, where applicable. Students will be given instructions on how to take the exam. All exams are proctored by the Voice Proctor® proctoring system. An overview of the system is [provided here](#) and it requires no training or learning curve. Grades of 70% or above are considered passing grades and qualify for recommended transfer credit.

The final exam is based on the video course modules. Additional resources detailed in this syllabus are helpful for background and for building greater understanding of the course materials.

Inquiries can be made through the LawShelf Contact form on our website by clicking the "email us" button that appears at the bottom of most LawShelf pages. Transcripts can be ordered via Parchment, as detailed on our website.

Case Studies

Many LawShelf video courses include case studies. These do not necessarily teach new material but are meant to demonstrate how the materials covered in the course are applied by various courts. Concepts covered in the case studies are covered on the final exam; so watching the case studies is necessary before taking the exam. However, it is unnecessary to memorize the facts and details of the cases covered in these case studies.

Self-Quizzes

Video-course modules and case studies feature self-quizzes that consist of practice questions on the materials covered in the videos. These questions are presented for the benefit of the student and are **important to review before taking the final exam** because they are similar in style and substance to the questions on the final exam. These quizzes are not graded or monitored and there is no record of how students answer these questions. Students may answer these questions as many times as they like and are encouraged to keep re-taking the quizzes until they have mastered all the questions.

Study Guide

Introductory Videos

These videos provide background to help students better understand the main parts of the course, which are the video-course modules below.

IRA

<https://lawshelf.com/shortvideoscontentview/ira/>

Roth IRA

<https://lawshelf.com/shortvideoscontentview/roth-ira/>

401(k)

<https://lawshelf.com/shortvideoscontentview/401k/>

Tax-Deferred Retirement Accounts Part 1

<https://lawshelf.com/shortvideoscontentview/tax-deferred-retirement-accounts-part-i/>

Tax-Deferred Retirement Accounts Part 2

<https://lawshelf.com/shortvideoscontentview/tax-deferred-retirement-accounts-part-ii/>

Courseware Readings

These courseware readings provide background to help students better understand the main parts of the course, which are the video-course modules below.

IRS Publication 590-A: Contributions to Individual Retirement Arrangements
<https://www.irs.gov/publications/p590a>

Department of Labor, What You Should Know About Your retirement Plan
<https://www.dol.gov/sites/dolgov/files/ebsa/about-ebsa/our-activities/resource-center/publications/what-you-should-know-about-your-retirement-plan.pdf>

Video Course Modules

These videos constitute the main part of the course and are they sources of the questions on the final exam.

ERISA and Pension Plans Course Overview
<https://lawshelf.com/videocoursescontentview/erisa>

Overview of the Employee Retirement Income Security Act - Module 1 of 5
<https://lawshelf.com/videocoursesmoduleview/overview-of-the-employee-retirement-income-security-act-module-1-of-5>

Qualified Retirement Plans - Module 2 of 5
<https://lawshelf.com/videocoursesmoduleview/qualified-retirement-plants-module-2-of-5>

Welfare Plans, Multiemployer Plans and Reporting Obligations - Module 3 of 5
<https://lawshelf.com/videocoursesmoduleview/welfare-plans-multiemployer-plans-and-reporting-obligations-module-3-of-5>

Fiduciary Responsibilities and Participant Rights - Module 4 of 5
<https://lawshelf.com/videocoursesmoduleview/fiduciary-responsibilities-and-participant-rights-module-4-of-5>

Hot Topics in ERISA Litigation - Module 5 of 5
<https://lawshelf.com/videocoursesmoduleview/hot-topics-in-erisa-litigation-module-5-of-5>