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Keeping You
On Target.



DOL and IRS Encourage Workplace Retirement Savings for Smaller Employers by Expanding Availability of Multiple Employer Plans

A multiple employer plan (MEP) allows employees of unrelated private-sector employers to participate in a single tax-qualified retirement plan sponsored by an employer group or association or a professional employer organization (PEO). Generally, joining an MEP is an efficient way to reduce the cost of establishing and maintaining a broad-based retirement plan that is subject to the Employee Retirement Income Security Act of 1974 (ERISA) by using a common plan administrator and pooled investments.

[Click here](#) to read more.

Treating Numbers Like Numbers
and People Like People



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When Nonprofits Need to Register in Multiple States

Many not-for-profit organizations use fundraising methods that cross state boundaries. If your nonprofit is one of them, it may need to register in multiple jurisdictions. But keep in mind that registration requirements vary — sometimes dramatically — from state to state. So be sure to determine your obligations before you invest time and money in registering.

The Critical Activity

How do you know if your nonprofit needs to register in other states?

Read more by [clicking here](#).





Take Advantage of the Gift Tax Exclusion Rules

As we head toward the gift-giving season, you may be considering giving gifts of cash or securities to your loved ones. Taxpayers can transfer substantial amounts free of gift taxes to their children and others each year through the use of the annual federal gift tax exclusion. The amount is adjusted for inflation annually. For 2019, the exclusion is \$15,000.

[Read more.](#)



For Best Results, Start Your Strategic Planning Early

Time flies when you're having fun — and running a business. Although it's probably too early to start chilling a bottle of bubbly for New Year's Eve, it's certainly not too early for business owners to start doing some strategic planning for next year. Here are some ways to get started.

Begin With Your Financials

A good place to find inspiration for strategic objectives is your financial statements. They'll tell you whether you're excelling or struggling so you can decide how strategically ambitious or cautious to be in the coming year.

[Click here](#) to read more.



Leadership Spotlight: Hannah Milewski, CPA

We are excited to feature Hannah for this month's leadership spotlight. She has been an integral part of the Williams Overman Pierce team since 2009.

Favorite Quote: "Promise me you'll always remember that you are braver than you believe, stronger than you seem, and smarter than you think."



Describe Yourself:

Driven, Loyal, Caring.



What Motivates You:

My family!



Travel Anywhere in the World:

Switzerland.



Primary Industries:

Construction and non-profit organizations.



Greatest Achievement:

Passing the CPA exam.



Best Advice You've Given:

Work hard, play harder.

[Click here](#) for Hannah's full bio and contact information.