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ERISA PRACTICE AND LITIGATION

2026 Edition

Released in April 2026

By Lee T. Polk

Enclosed is the 2026 Update for *ERISA Practice and Litigation* authored by Lee T. Polk. This year we are providing you with all new contents of the treatise. The four-volume set has been converted into an annual, four-volume soft-cover format. This should greatly improve the reader's experience in terms of filing pages within a limited binder system—allowing the work to easily expand as needed.

In addition to moving the treatise to soft-bound format, the frequency of the updates is also changing, to once per year, from the previous twice-per-year (one revised chapter and one revised supplement) frequency. Although the format and frequency are changing, customers are not being charged more for these changes. Subscribers will pay the same overall price that they would have been charged during the course of the year. Note that with the change in the book's frequency, the invoice may reflect a higher price per release. However, this is due to redistributing the same total price over the new release schedule, which comprises the same year content.

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Filing Instructions

REMOVE and RECYCLE the entire treatise (binders and contents).

PLACE the new 2026 soft-cover edition (Volumes 1, 1A, 2, and 3) in your library.

Highlights

New features and recent developments in this 2026 update include:

- Updated § 1:1, Introduction
- Updated § 1:17, Benefits professionals and practice
- Updated § 2:2, Elements of Fiduciary Responsibility—Plan
- Updated § 2:4, Elements of Fiduciary Responsibility—Top hat plans

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- Updated § 2:5, Elements of Fiduciary Responsibility—Welfare plans
- Updated § 2:6, Elements of Fiduciary Responsibility—Single-employer, multiemployer, and multiple employer plans
- Updated § 2:8, Elements of Fiduciary Responsibility—Fiduciary
- Updated § 2:9, Nature of fiduciary conduct
- Updated § 2:10, Elements of Fiduciary Responsibility—Plan assets
- Updated § 2:11, Elements of Fiduciary Responsibility—Plan sponsor, administrator, and controlled group
- Updated § 2:15, Elements of Fiduciary Responsibility—Nonfiduciary actors and conduct
- Updated § 3:4, Exclusive purpose
- Updated § 3:7, Compliance with governing documents
- Updated § 3:8, Prohibited transactions—In general
- Updated § 3:13, Prohibited acts—Outside services and office space
- Updated § 3:19, Prohibited transactions—Administrative exemptions
- Updated § 3:21, Basic statutory requirements for ERISA plans
- Updated § 3:23, Operational principles of fiduciary conduct—Plan communications

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