

Retirement Plans

Attorneys in our Employee Benefits Group advise clients as to the design, implementation, maintenance, amendment and even termination of qualified defined contribution plans (such as 401(k) plans and ESOPs) and defined benefit plans. Our attorneys have a wide range of experience involving many different types of retirement plans, including large and small businesses, professional firms, nonprofit organizations, collectively-bargained plans, and public governmental plans. Additionally, we not only assist with compliance issues, but also the improvement of our client's benefit plan designs. In today's litigious society, we regularly counsel our clients in fiduciary best practices in order to minimize our client's exposure to liability.

Experience

Below is a representative sample of the types of services we provide our clients in connection with retirement plans:

- ✓ Preparing plan documents, amendments, summary plan descriptions and employee communications.
- ✓ Interacting with the IRS, PBGC or DOL in the case of plan audits or needed corrections.
- ✓ Advising as to plan qualification and administrative and compliance issues, such as compensation and contribution limits and discrimination testing questions.
- ✓ Advising clients as to prudent fiduciary practices as it relates to the selecting and monitoring of plan investments.
- ✓ Assisting with participant claims, appeals and documents requests.
- ✓ Assisting with merger and acquisition issues, including conducting due diligence, memorializing the transfer of assets and documenting any necessary post-merger plan changes.

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Our Employee Benefits Group is always on top of any changes in the law that affect qualified retirement plans, proactively notifying clients of and addressing these changes, and thus ensuring timely amendments are adopted and other needed changes to plans or policies are implemented.

News, Events, and Publications

Supreme Court Emphasizes Requirements About Selecting and Monitoring Plan Investments

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