

Recent Client Work Examples

We work with employers and businesses of all sizes. Our ERISA and employee benefits attorneys also work with HR managers and their advisors, such as financial advisors, employee benefit consultants, brokers and agents, fiduciaries, plan sponsors, TPAs, and plan administrators.

Retirement Plan Review and Compliance

- Assisting an employer with submitting delinquent Form 5500s and drafting a wrap plan document to streamline future filings
- Making corrections to qualified retirement plans through the IRS Employee Plans Compliance Resolution System using self-correction procedures and the voluntary correction program, including calculations of corrective qualified nonelective contributions (QNEC) and earnings
- Requesting Determination Letters and rulings from the IRS regarding different qualified retirement plans
- Advising an employer regarding affect of employment litigation on retirement plan
- Providing advice on document changes to qualified retirement plans as well as advice with relation to merging of plans, terminating plans and freezing plans
- Reviewing, updating, and preparing amendments to various retirement plan documents

Executive Compensation

- Drafting a Supplemental Executive Retirement Plan for the CEO of a large company
- Advising clients in the development of executive compensation strategies, including deferred compensation, phantom stock plans, restricted stock, stock options, current bonus plans, share appreciation rights, stock equivalency plans and drafting employment agreements which reflect such executive compensation strategies
- Assisting a client with remedying 409A deferred compensation issues

Welfare Plans

- Assisting a large manufacturing client with compliance issues surrounding their on-site medical clinic
- Advising a large employer with variable hour employees on issues relating to the ACA's employer mandate and coordinating compliance tracking with its homegrown payroll system
- Assisting a VEBA in responding to an IRS audit and corresponding 105(h) non-discrimination testing
- Working with employers and their insurance advisors to develop strategies to lessen the ACA's burden on their businesses
- Drafting revised HIPAA policies, notice of privacy practices, and business associate agreements for clients with self-funded group health plans
- Developing a retiree medical benefit strategy for a large physician medical practice
- Assisting a professional corporation with revising their Section 125 plan and FSAs to comply with non-discrimination requirements

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