

QUALIFIED AND NON-QUALIFIED RETIREMENT PLANNING

Our lawyers develop state-of-the-art qualified and non-qualified retirement plans, including pension and defined-benefit plans, defined-contribution plans and employee stock ownership plans (ESOPs). We assist with plan design and drafting, compliance, as well as, benefit calculations and employee communications. We represent publicly traded and privately held companies, tax-exempt and public entities, including educational and research institutions, charitable organizations, and municipalities and other governmental employers.

The firm's attorneys work with clients to ensure retirement and welfare plan compliance with relevant regulatory mandates, including those of the Internal Revenue Service and the Department of Labor. We also assist clients in Employee Retirement Income Security Act (ERISA) matters, with a focus on fiduciary responsibilities, compliance, participants' rights and plan investments. When disputes or claims arise, we counsel plan administrators and trustees to place them in the best position to defend their fiduciary decisions. We also work closely with attorneys from the firm's transactional practice to provide benefits-related due diligence and transaction legal advice in corporate reorganizations, restructurings, acquisitions, mergers, spin-offs and divestitures. Our services include assisting with:

- Cash balance plans
- Defined-benefit and defined-contribution plans
- Employee Stock Ownership Plans (ESOPs)
- Government filings
- IRS compliance
- Administration and recordkeeping compliance
- SERPS
- Top-Hat Plans
- Retirement communications
- Tax-exempt employer plans
- Third-party service providers
- Transactional support