

Barry Kozak

Barry Kozak is a Consultant at October Three Consulting, LLC, and works out of their Chicago office. His primary responsibility is the development of a new practice area, which will deliver financial literacy and retirement planning education, materials, and services. Meanwhile, he has been integrated into their existing ERISA Compliance, Dispute Resolution, and Benefits Communications practices.

Barry holds academic appointments at The John Marshall Law School, Chicago, where he teaches online classes in their LLM in Estate Planning program, and at Loyola University Chicago School of Law, where he teaches classes in Elder Law and in Financing an Ageing Population, and where he has been named a Distinguished Scholar in Residence for 2017.

Barry has earned a BS (in Applied Statistics) from The University of Albany, State University of New York; a JD and a LLM (in Employee Benefits) from the John Marshall Law School, Chicago; and, a MPP (in Public Finance and Taxation) from the University of Chicago Harris School of Public Policy Studies. In addition, Barry holds the following Professional Designations: Attorney, Enrolled Actuary, Chartered Financial Consultant, and Certified Pension Consultant.

Barry is President-Elect of the Greater Chicago chapter of the Society of Financial Service Professionals, and as a member of its Board of Directors, leads its professional development efforts; is the co-chair of Chicago Sister Cities International, China Committee's Shanghai Social Exchange Subcommittee, where he will be co-leading a delegation of 8 Chicagoan professionals to Shanghai in October 2017, to discuss how each city supports its elderly populations; is a member of the Task Force of the Elder Law & Miscellaneous Remedies Division of the Circuit Court of Cook County; and, is a member of the research committee, and Special Advisor to the Board, of the Retirement Income Industry Association.

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