

BARRY KOZAK

Chicago, Illinois

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CURRICULUM VITAE AS OF JULY 2019

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EDUCATION

Not received

University of Illinois at Chicago, College of Applied Science, Chicago, Illinois

Doctor of Philosophy (PhD) - Disability Studies

matriculated 2011, currently on voluntary leave of absence

2009

University of Chicago Harris School of Public Policy, Chicago, Illinois

Master of Public Policy (MPP) - Public Finance and Taxation

2000

The John Marshall Law School, Chicago, Illinois

Master of Law (LLM) - Employee Benefits Law

Juris Doctor (JD)

1987

The State University of New York, Albany, New York

Bachelor of Science (BS) - Applied Statistics

received in absentia in 1994

PROFESSIONAL DESIGNATIONS

2018, *Active, and renewed for 2019*

The American College of Financial Services, Bryn Mawr, Pennsylvania

Retirement Income Certified Professional

The RICP® designation equips financial advisors with the knowledge to effectively manage the transition from asset accumulation during a client's working years to asset decumulation in retirement.

<https://www.theamericancollege.edu/designations-degrees/RICP>

2015, *Active through October 2019*

Office of the Illinois Secretary of State, Springfield, Illinois

Notary Public

A notary acts as an official and unbiased witness to the identity of person who comes before him or her for a specific purpose, and helps to prevent fraud and forgery.

<https://www.cyberdriveillinois.com/departments/index/notary/home.html>

2001, *Voluntarily inactivated in 2017*

American Society of Pension Professionals & Actuaries, Arlington, Virginia

Certified Pension Consultant

The CPC® designation signifies a commitment to, and knowledge of, the pension and retirement plan industry, and the ability to convey this information to clients so that they can make well-informed decisions.

<https://www.asppa.org/educate/retirement-plan-academy/cpc-certified-pension-consultant>

2000, *Active, and renewed for 2019*

The Supreme Court of the State of Illinois, Springfield, Illinois

Attorney

The Illinois Attorney Registration and Disciplinary Commission ensures attorneys comply with Illinois' Rules of Professional Responsibility to practice law and counsel clients within the state.

<http://www.iardc.org/lawyersearch.asp>

1996, *Active, and renewed for 2019*

The American College of Financial Services, Bryn Mawr, Pennsylvania

Chartered Financial Consultant

The ChFC® designation signifies an understanding of basic financial planning concepts, including insurance, income taxation, retirement planning, investments and estate planning, and some more focused areas, including behavioral finance, financial planning for families with special needs dependents, small business planning, financial planning for clients in the LGBT community, and financial planning for divorce.

<https://www.theamericancollege.edu/designations-degrees/ChFC>

1995, *Voluntarily inactivated in 2000*

U.S. Department of the Treasury, Washington, District of Columbia

Enrolled Actuary

An Enrolled Actuary may perform actuarial services required under ERISA or regulations thereunder.

<https://www.irs.gov/tax-professionals/enrolled-actuaries/enrolled-actuary-information>

1995, *Voluntarily inactivated in 1996*

Financial Industry Regulatory Authority, Washington, District of Columbia

General Securities Representative

A General Securities Representative, by passing the Series 7 exam, possesses the knowledge needed to perform the critical functions of a general securities representative, including sales of corporate securities, municipal securities, investment company securities, variable annuities, direct participation programs, options and government securities.

<https://www.finra.org/industry/series7>

Uniform Securities Agent

A Uniform Securities Agent, by passing the Series 63 exam, is allowed to sell investment products, such as mutual funds, variable annuities and unit investment trusts.

<https://www.finra.org/industry/series63>

1990, *Voluntarily inactivated in 1996*

New York State Department of Financial Services, Albany, New York

Life and Health Insurance Broker

A Life and Health Insurance Broker represents the insured and can place business with any company authorized in New York which will accept it.

<https://www.dfs.ny.gov/insurance/licinfo.htm>

HONORS AND REWARDS

Spring 2017

Loyola University Chicago School of Law, Chicago, Illinois

Distinguished Scholar in Residence in elder law and financial gerontology

A Distinguished Scholar in Residence is available to the full time faculty to provide research assistance.

2012

The John Marshall Law School Alumni Association, Chicago, Illinois

Distinguished Service Award recipient

Each year, the law school's Alumni Board recognizes up to five alumni who have shown a propensity to frequently provide pro bono service to the institution, the profession, and the community.

August 2011

Bloomberg BNA Tax & Accounting, Washington, District of Columbia

Featured Author

Each year, Bloomberg BNA, then BNA, features authors of their various treatises in an annual marketing calendar.

2001-2007

The Internal Revenue Service, Great Lakes TE/GE Division, Chicago, Illinois

Recipient of several "Unsung Hero" Awards

The Tax Exempt, Governmental Entities Operating Division, Employee Plans Group, Great Lakes Region presents "Unsung Hero" certificates to practitioners in private practice who help to train the Employee Plan agents.

2001

The American Bar Association Section of Taxation, Washington, District of Columbia

Nolan Fellow (member of its inaugural class)

Each year, the Tax Section provides scholarships to up to six young lawyers who are actively involved in the Section and have shown leadership qualities.

2000

The John Marshall Law School, Chicago, Illinois

Law Student Ambassador of the Year

Each year, at graduation, the Dean of the school provides an award to the person who helped the faculty and administration promote the school during matriculation.

PROFESSIONAL EXPERIENCE

Employee Benefits Educator and Consultant (and Sole proprietor) 2019 - present

Retirement HELP, Inc., Chicago, Illinois (click [here](#) for website)

Retirement HELP is a consulting firm that provides an expertise in employee benefits issues and communications to small businesses, financial service professionals, and professional associations

- Help small employers implement employee benefit programs as their businesses grow
- Help communicate employee benefits programs to clients' employees and their beneficiaries

ERISA Regulatory Consultant, 2018 - 2019

Aging Workforce Management Consultant, 2017 - 2019

October Three Actuarial Consultants LLC, Chicago, Illinois

October Three consults, designs and administers retirement programs for businesses, with a focus on traditional pension plans and market return cash balance plans

Assisted clients with technical issues with their traditional and cash balance pension plans

- Educated colleagues about non-pension issues (such as health, disability and long-term care insurance)
- Assisted in marketing, communicating, administering, and ensuring the legal compliance of our client's market return cash balance pension plans.
- Added information about the financial, legal, health and practical issues individuals face after retirement onto our benefit communication portal for the participants of our client's pension plans.
- Created an internal onboarding summary document which communicates our internal employee benefit programs available to new employees.
- Developed the content and market strategy for age-friendly management consulting services
- Provided age-friendly workforce consulting services and education to our pension plan clients, such as: phased retirement programs; financial wellness and retirement readiness education; support services for employees who are caregivers for aging parents and siblings; including "age" in diversity statements and mitigating ageism within the workforce; and, making their business environment and products attractive to older clients and customers

Elder and Estate Planning Attorney, 2015 – 2017

Law Offices of Barry Kozak, Chicago, Illinois

The Law Offices of Barry Kozak provided elder law and estate planning counsel to individuals and families

- Attracted clients through synergistic relationships with financial service professionals
- Managed all aspects of a client relationship and proactively communicated with them
- Assisted families in discovering and memorializing their end-of-life and legacy goals
- Developed synergistic relationships with various financial services professionals to help them to educate their clients

Director of the Elder Law Program, 2010 – 2015

Associate Director of the Graduate Tax Law and Employee Benefits Programs, 2001 – 2005 (part-time), 2005 – 2010

Professor and Adjunct Member of the Faculty, 2000 – 2015 (part-time)

The John Marshall Law School, Chicago, Illinois

The John Marshall Law School is fully accredited independent law school that offers JD and several LLM degrees to law students and several MJ graduate degrees to non-attorney professionals. In 2019, the school will become a public law school as part of the University of Illinois at Chicago

- Hired and monitored numerous adjunct professors and developed strong Boards of Directors
- Adjusted normal operations and special events as institutional budgets demanded
- Adopted mind mapping software to support my mentorship of student progress and goals
- Developed the JD Certificate program in Elder Law and managed all administrative aspects of the program including hiring adjunct professors and monitoring students' academic performance
- Ensured academic excellence in each class by hiring and managing the cadre of adjunct professors teaching classes and counselling students enrolled in the program
- Organized the "2014 International Elder Law and Policy Conference" where international scholars and experts convened to present research and debate human rights for older persons
- Traveled to the East China University of Political Science and Law, Shanghai, several times to discuss the emerging field of forensic gerontology with their faculty, and was invited back to be a visiting professor in 2014
- Served as the American Director of the Sino-American Research Center for an Aging Population (a joint collaboration between The John Marshall Law School, Chicago, and the East China University of Political Science and Law, Shanghai)
- Assisted in the day to day operation and long term planning of two academic programs
- Ensured academic excellence in each class by managing the cadre of adjunct professors teaching classes and counselling students enrolled in the programs
- Organized major conferences and smaller career-oriented programs
- Worked with a different student editor selected each semester to produce a substantive newsletter
- Served as faculty advisor for independent research papers for JD, LLM and MS students
- Served as faculty coach for the team of J.D. and LLM students representing the school at several Law Student Tax Challenges, hosted by the American Bar Association Section of Taxation
- Developed and taught a variety of classes at the JD and LLM levels in the general areas of: Employee Benefits law, Tax law, Elder Law and Estate Planning, and general legal writing and research
- Assisted in the school's preparation and presentation of accreditation review
- Served on the faculty Orientation Committee, and ad hoc committees on distance education and classroom and library technology
- Served as faculty coach for the "shadow team" of students at its International Information Technology and Privacy Law Moot Court competitions, and served on its planning committee
- Assisted with the school's bar preparation skills workshops
- Served as faculty coach for a variety of Moot Court or Negotiation teams at inter-scholastic competitions, but consistently

Technical Education Consultant, 2005 (part-time)

The American Society of Pension Professionals and Actuaries, Arlington, Virginia

The American Society of Pension Professionals & Actuaries (ASPPA) is part of the American Retirement Association, the premier non-profit national organization for retirement plan professionals in the industry. One of its major goals is to educate retirement plan professionals through a series of proctored and peer-reviewed examinations

- Wrote the initial learning objectives and bank of exam questions for one of the organization's new exams (the Retirement Plan Fundamentals Part 2 (RPF-2), which is a required course to receive their Qualified 401(k) Administrator ("QKA") designation. Topics for this exam include: plan administration, including census collection, benefit allocations and coverage and nondiscrimination testing, daily valuation recordkeeping, appropriate investments for daily valuation plans, fiduciary considerations including investment fees and revenue sharing, the processes involved in daily valuation recordkeeping, mutual fund trading and ethics concerning trading errors, and plan mergers and terminations

Technical Assistant, 2005 (part-time)

Freelance Independent Contractor, Chicago, Illinois

Donald Delves (now Executive Compensation practice leader for North America at Willis Towers Watson) is an expert in the accounting aspect of executive compensation, and was asked to author a book published by Specialty Technical Publishers titled "Accounting For Compensation Arrangements"

- Assisted Don Delves, a colleague, in researching and understanding the new rules promulgated by the Financial Accounting Standards Board, and helped edit his manuscripts before he submitted them

Legal Consultant, 2001 - 2005 (part-time)

CCA Strategies, Chicago, Illinois

CCA Strategies, which is now part of Aon Hewitt, was a national pension consulting and actuarial administration firm

- Assisted clients with technical issues about their pension plans
- Educated colleagues about the ever-changing landscape of ERISA governance of benefit plans
- Cultivated public data to help develop strategic and proprietary best practices

ERISA Associate Attorney, 2000 - 2001

Bell, Boyd & Lloyd, LLC, Chicago, Illinois

Bell, Boyd & Lloyd, which is now part of K&L Gates, was a regional law firm that specialized in business planning.

- Assisted clients with all of their pension, health, executive compensation, and insurance programs
- Supervised several junior and summer associates
- Reviewed RFPs and negotiated contracts with vendors on behalf of clients
- Worked exclusively in the Employee Benefits and Executive Compensation Group, which was part of their larger Tax Law group
- Researched issues and drafted documents for clients' retirement benefit plans, health and welfare benefit plans, and other employee benefit plans and programs, and performed due diligence of employee benefits issues for business transactions, such as mergers and acquisitions.issues for clients, and drafted documents for clients' retirement benefit plans, health and welfare benefit plans, and other employee benefit plans and programs

Employee Benefits Law Clerk, 1998 - 2000 (part-time, while attending law school)

Laner Muchin Dombrow Becker Levin Tominberg, Ltd., Chicago, Illinois

Laner Muchin is a regional law firm that specializes in labor and employment law

- Provided research support for attorneys in the ERISA and Employee Benefits group

Summer Intern, 1998 (as part of a summer study abroad program)

Ministry of Social Security, State Private Funds Supervision, Budapest, Hungary

The Ministry, among other duties, approves all private investment funds that applied to maintain pension accounts for Hungarian citizens.

- Communicated major features of the United States Social Security system.
- Helped in crafting laws and regulations that would ultimately harmonize all relevant domestic Hungarian laws regarding Social Security and pensions in anticipation of the country's admittance into the European Union.

Legal Research Assistant, 1997 - 1998 (part-time, while attending law school)

Schiller Ducanto & Fleck, Chicago, Illinois

SDF is a regional law firm that specializes in family law

- Assisted several attorneys in researching, writing and editing chapters of a book on the income taxation and employee benefits issues with divorce

Federal Income Tax Planning Clerk, 1997 - 2000 (part-time, while attending law school)

Gilson Labus and Silverman CPAs, Chicago, Illinois

Gilson Labus Silverman is a regional accounting firm that provides business tax planning

- Assisted in the preparation of income tax returns for individuals and businesses
- Provided research for tax advisory projects and inquiries

Senior Administrative Manager, Consultant and Actuary, 1994 - 1996

Consulting Actuaries International Inc., New York, New York

CAI, now based in Fairfield, New Jersey, is a regional pension consulting and actuarial administration firm

- Managed 3 associates, and the annual operation of about 150 pension plans
- Participated on the new business development team

Director of Actuarial Services, 1993 - 1994

Belcor Pension Consultants, New York, New York

Belcor, now inactive, was a regional pension consulting and actuarial administration firm

- Acted as the liaison between the firm's clients' pension plans and an external actuary on all consulting, design and administration issues
- Managed 2 associates, and the annual operation of about 100 pension plans
- Accompanied CEO on many new business meetings

Retirement Plan Consultant and Pension Plan Administrator, 1990 - 1993

Pay Plans Corp., New York, New York

Pay Plans, now based in Greenlawn, New York, is a regional pension consulting and actuarial administration firm

- Acted as the quality control review for the administration of all plans
- Researched issues and discussed directly with clients

- Worked closely with the business owner to develop uniquely tailored plans for business clients, especially as the new world of nondiscrimination testing was being introduced

Senior Pension Administrator and Consultant, 1998 - 1990

The Ibex Group, New York, New York

Ibex, now inactive, was a regional pension consulting and actuarial administration firm

- Administered all aspects of pension plans
- Served as the lead trainer for all new junior associates

Pension Plan Administrator and Consultant, 1987 - 1988

Improved Funding Techniques, Inc., Lynbrook, New York

IFTI is a regional pension consulting and actuarial administration firm

- Assisted in the general administration and communication of defined benefit pension plans
- Received great training in the mechanics of pension plan and how they further a client's business goals
- Recognized that technical issues needed to be communicated to clients in simple terms

TEACHING EXPERIENCE

2000 - present

The John Marshall Law School, Chicago, Illinois

Adjunct Professor of Law

- Compensation Law: Taxation and Other Legal Issues
- Current Topics in Information Technology Law: Workplace Privacy Issues
- Elder Law: Basics (live and on-line format)
- Elder Law: Informed Consent Seminar
- Elder Law: Introduction
- Elder Law: Planning for Health and End of Life
- Elder Law: Planning for Property (live and on-line format)
- Estate Planning for Young Married Couples (on-line format)
- Estate Planning Issues for Elderly Clients (on-line format) - still teaching
- Estate Planning with Retirement Plans and IRAs (on-line format) - still teaching
- Federal Income Taxation
- Introduction to Legal Analysis, and Substantive Law Overview
- Sexual Orientation Law
- Survey of Employee Benefits Law
- Tax and Employee Benefits Research
- Taxation of Corporations, Corporate Transactions and Shareholders
- Trusts and Estates (live and on-line format)

2015 - 2017

Loyola University Chicago School of Law, Chicago, Illinois

Adjunct Professor of Law

- Elder Law
- Financing an Aging Population

Spring 2014

East China University of Political Science and Law, Shanghai, China

Visiting Professor

- Comparative Elder Law (taught to English-speaking LL.M.-level students)
- Legal Research for American Law (taught to English-speaking JD-level students)
- Legal Writing for an American Audience (taught to English-speaking JD-level students)

2010 - 2012

DePaul University College of Law, Chicago, Illinois

Adjunct Professor of Law

- Employee Benefits Law

TEXTBOOKS, TREATISES AND BOOK CHAPTERS

2010

Carolina Academic Press

"Employee Benefit Plans"

- Author

2010

Bloomberg BNA Tax Management Compensation Planning Portfolios

"Employee Benefit Plans and Issues for Small Employers" (353-4th T.M.)

- Author

2009

American Institute for Certified Public Accountants

"CPA's Guide to Retirement Plans for Small Businesses"

Co-Editor

- Author of chapter titled "Basic Introduction to the Regulation of Employee Benefits"
- Author of chapter titled "Funding a Defined Benefit Pension Plan"
- Author of chapter titled "Maximum Benefits in Qualified Retirement Plans"
- Author of chapter titled "Required Minimum Distributions After Age 70½"

2009 - 2014

Aspen Publishers

"The 457 Answer Book"

- Author of chapter titled "Current Funding, Investment, Disclosure and Legal Issues with Governmental Defined Benefit Plans"

PUBLISHED ARTICLES

2019

NYU Review of Employee Benefits and Executive Compensation

"An Analysis of the Market Return Cash Balance Pension Plan in the Current Economic Environment"
Forthcoming

2018

Benefits Law Journal

"Phased Retirement Programs as Part of an Age-Friendly Business Strategy"
Vol. 31, No. 4

Benefits Quarterly (through International Foundation of Employee Benefit Plans)

"Revisiting the CLASS Act: LTC as an Employee Benefit"
Vol. 34, No. 3

Society of Actuaries

"Employers Should Consider a Single Plan Document with Pension Benefits and Employee Salary Deferrals"
Securing Future Retirements Essay Collection on the soa.org website

2017

The Benefits Law Journal

"PBGC Premiums: A Necessary Overhead Cost for Defined Benefit Plan Sponsors That Should Be Minimized"
Vol. 30, No. 2, p. 16

Society of Actuaries

"Time to Ditch the Three-Legged Stool Analogy for Retirement and Replace it with a Two-Picture Analogy: A Mailbox and a Piggy Bank"
Financial Wellness Essay Collection on the soa.org website

Tax Management Compensation Planning Journal

"Over the Years, Insurance has Become an Important Employee Benefit"
Vol. 45, No. 5, p. 152

2016

The Benefits Law Journal

"Qualified Retirement Planning Services to Your Clients: A New Fringe Benefit for Their Employees and a New Profit Center for You"
Vol. 29, No. 4, p. 56

Creighton Law Review

"The Forgotten Rule of Professional Conduct – Representing a Client with Diminished Capacity"
Vol. 49, p. 827

2014

Journal of Pension Planning & Compliance

"ERISA Benefit Statements of the Future: The Need to Explain the Cost of Retirement, Including Out-of-Pocket Medical and Long-Term Care Expenses"

Vol. 39, p. 1

2013

Benefits Law Journal

"How Plan Administrators Should Assess and React to a Plan Participant with Diminished Mental Capacity"

Vol. 26, No. 4, p. 12

2011

NYU Review of Employee Benefits and Executive Compensation

"White Paper: How Congress Can Amend the Code to Make Target Benefit Plans More Attractive to Employers"

The Law Teacher

"Teaching On-Line Has Been a Great Experience for Me (Hopefully for My Students as Well)"

Vol. 18, No. 3, p. 34

The Chicago Bar Record

"Civil Unions in Illinois: Issues That Illinois Attorneys Should Consider"

April edition

2010

NYU Review of Employee Benefits and Executive Compensation

"Domestic Partnership and Same-Sex Spouse Issues with Employer Provided Health Benefits: The Intersection of Federal Income Tax Principles with Individual State Income Tax Regimes"

And

"A Review of Cash Balance Plan Backloading and Whipsaw Litigation"

The Chicago Daily Law Bulletin

"Illinois Gets a Grade of 'Zero' for Pension Plans Funding"

March 5 edition

2008

The Benefits Law Journal

"The Funding of Public Sector Pension Plans: Are They Truly in Crisis Mode?"

Vol. 21, No. 4, p. 23

BNA Tax & Accounting, Insights and Commentary

"Current Initiatives by IRS to Assist Small Employers that Adopt Pre-Approved Qualified Retirement Plan Documents"

October edition

BNA Tax & Accounting, Insights and Commentary

"Reporting and Disclosure Issues with Small Employer Employee Benefit Plans"

August edition

CCH Pension Plan Guide, Benefit Practice Portfolios

"Clarifying Qualification Requirements for Eligible Government Plans: IRS Increases Education and Compliance Efforts"

July edition

2007

BNA Tax Planning and Compensation Journal

"Sections 415 and 401(a)(17) Harmonized: Bad News for Qualified Retirement Plans, But Potentially Good News for Nonqualified Excess Benefit Plans"

December edition

CCH Pension Plan Guide, Benefit Practice Portfolios

"Communicating Benefits Promised: Best Practices for Meeting ERISA's Disclosure Requirements"

July edition

The Journal of Pension Benefits

"Are Cash Balance Arrangements Age Discriminatory? The Seventh Circuit and Congress Say No, But Questions Remain"

Vol. 14, p.11

The ASPPA Journal

"The Elimination of Redundant, Non-Core, and Under-Utilized Optional Forms of Benefits. The Definition of Early Retirement Benefits and Retirement-Type Subsidies. What Does It All Mean? – An analysis of Treasury Regulations Published Under IRC §411(d)(6)"

Spring edition

2006

Employee Benefits and Executive Compensation:

Proceedings of New York University's 59th Annual Conference on Labor

"Much Ado About the Meaning of 'Benefit Accrual': The Issue of Age Discrimination In Hybrid Cash Balance Plan Qualification Is Dying But Not Yet Dead"

The ASPPA Journal

"The Final Word on the Disclosure of Relative Values"

September/October edition

2005

The ASPPA Journal

"The New Rules for Nonqualified Deferred Compensation Plans"
March/April edition

Tax Management Compensation Planning Journal

"Revisiting the Reasonableness of Actuarial Assumptions in Defined Benefit Plans After EGTRRA and its Resulting Treasury Regulations"
Vol. 33, No. 3, p. 90

2004

The John Marshall Law Review, Employee Benefits Law Symposium edition

"Cash Balance Plans: An Integral Part of the Defined Benefit Plan Renaissance"
Vol. 37, p. 753

The Journal of Pension Benefits

"Cash Balance Plans: Still a Good Program if We Look to the Logic from Eaton and BankBoston Rather than from IBM"
Vol. 11, p. 29

2002

The ASPA Journal

"How Plan Administrators Need to Review Qualified Domestic Relations Orders (QDROs)"
November/December edition

The CBA Record

"At the Crossroads: The Intersection of Pregnancy Tests, a Deceased Baby and Medical Privacy Rights"
September edition

The Carolina Business Journal

"The New Required Minimum Distribution Rules - Simpler Than the Old Rules, But Still Not Simple"
July edition

2001

The CBA Record

"Re-employment and Other Rights of Employees Who Go on Uniformed Service Leave Under USERRA"
November edition

PRESENTATIONS

2019

Eighth Annual Employee Benefits Law Academic Conference

"Market Return Cash Balance Plans in Corporate America"

March 29, 2019, Champaign, IL

2018

Seventh Annual Employee Benefits Law Academic Conference

"Are Employers Taking Advantage of Eligible Combined Plans, as defined in IRC §414(x)?"

April 13, 2018, Oklahoma City, OK

2017

East China University of Political Science and Law

"The Legal Definition of Diminished Mental Capacity Under American Law"

Special lecture to faculty and graduate students, October 18, 2017, Shanghai, China

Los Angeles chapter of the National Association of Stock Plan Professionals

"Assisting your C-Suite and Directors in Understanding Retirement, Aging, Estate and Legacy Planning"

Monthly meeting, April 25, 2017, via webinar from Chicago, IL

American Society on Aging

"Legal Issues with Family Caregivers"

Annual Aging in America conference, March 22, 2017, Chicago, IL

Chicago chapter of the National Association of Stock Plan Professionals

"Assisting your C-Suite and Directors in Understanding Retirement, Aging, Estate and Legacy Planning"

Monthly meeting, March 14, 2017, Chicago, IL

2016

Illinois Real Estate Journal

"Segmented Solutions in the Market: Design, Construction, Management, and Legal Issues"

Chicagoland Senior Housing Real Estate Conference, Panel Moderator, November 15, 2016, Chicago, IL

Illinois Institute of Continuing Legal Education

"How the Affordable Care Act is Affecting Medicare and Medicaid"

Annual Short course on Elder Law conference, November 4, 2016, Lisle, IL

Alzheimer's Association and Age Options

"Legal Considerations"

Annual Alzheimer's Conference, May 3, 2016, Orland Park, IL

Greater Chicago Chapter of the Society of Financial Services Professionals

"Succession Planning - Effective Retirement Strategies"

And

"Long Term Care - Emerging Issues for Your Boomer Clients"

45th Annual Sales Forum for Financial Professionals, March 22, 2016, Wheeling, IL

CBA/WBAI Joint Task Force on Women and Aging

"Family Caregivers: Legal Issues and Other Challenges"

Monthly meetings (Part I: January 21, 2016; Part II: February 19, 2016; Chicago, IL

2015

Chicago Bar Association Elder Law Committee

"Current Issues with Using IRAs and Employer-Provided Retirement Benefits to Fund Retirement"

Monthly meeting, November 13, 2015, Chicago, IL

Law & Society Association

"What is Mental Capacity for Purposes of Adult Guardianship Hearings, Which Professionals and Scientific Methods Can Most Accurately Predict Diminished Capacity, and How Can We Examine Whether Limited Adult Guardianships Are Properly Adjudicated in America?"

Annual conference, Decision Making and Older Adults panel, May 29, 2015, Seattle, WA

Fourth Annual Employee Benefits Law Academic Conference

"Rethinking Government's Role in Securing a Financially Sound Retirement"

March 27, 2015, Philadelphia, PA

American Society on Aging

"Elder Justice Center: An Innovative Response to Vulnerable Older Adults"

Annual conference, March 25, 2015, Chicago, IL

2014

United Nations Open-Ended Working Group on Ageing

"The Draft Chicago Declaration on the Rights of Older Persons"

Fifth Session, Side Event, part of the delegation presenting document, August 1, 2014, New York, NY

3rd World Congress on Adult Guardianship

"Limited Guardianship"

Judicial Standards panel, May 29, 2014, Arlington, VA

Chicago Bar Association Elder Law Committee

"Representing Clients with Diminished Mental Capacity"

Monthly meeting, co-presenter, November 24, 2014, Chicago, IL

Illinois Guardianship Association

"The Legal Framework of Mental Capacity"

Annual conference, September 18, 2014, Chicago, IL

2013

Jiawang People's District Court

"Elder Abuse in the USA"

Special lecture to judges, May 23, 2013, Xuzhou, China

East China University of Political Science and Law

"Financing Retirement in the USA"

Special lecture to faculty and graduate students, May 21, 2013, Shanghai, China

Illinois Governor's Conference on Aging and Disability

"Global Aging Populations: Issues and Solutions"

Annual conference, Discussant on Plenary Session, December 11, 2013, Chicago, IL

American Society of Pension Professionals and Actuaries

"Retirement Readiness: It's Much More Complicated Than a Simple, Magic Number"

Annual Meeting, October 28, 2013, National Harbor, MD

The John Marshall Law School

"The Forgotten Rule of Professional Responsibility: Representing a Client with Diminished Capacity"

Faculty Works in Progress, October 21, 2013, Chicago, IL

Continuing Education Institute of Illinois

"Decisional Capacity"

"Alzheimer's Disease: Challenges, Choices and Solutions" CLE program, June 6, 2013, Northlake, IL

American Society of Pension Professionals and Actuaries

"Retirement Readiness: A Metric That Matters, and a Real Differentiator"

The ASPPA Conference of the South, May 10, 2013, Atlanta, GA

Chicago Junior Law Faculty Workshop

"The Attorney's Responsibility in Assessing the Mental Capacity of a Client"

April 5, 2013, Chicago, IL

Illinois Institute of Continuing Legal Education

"Advanced Directives and Guardianship"

IICLE Practice Academy: Essentials of Elder Law and Special Needs Law CLE program, March 18, 2013, Chicago, IL

Association of American Law Schools

"Best Practices in Online LL.M. Programs"

Annual Meeting, Section on Post-Graduation Legal Education, panelist, January 6, 2013, New Orleans, LA
And

"Trusts and Estates, and an Aging Population: What We Need to Know and Teach"

Annual Meeting, Joint Program of Sections on Aging and the Law and Trusts and Estates, moderator and organizer, January 5, 2013, New Orleans, LA

2012

East China University of Political Science and Law

"Elderly Individuals with Diminished Capacity"

Special lecture to faculty and graduate students, November 8, 2012, Shanghai, China

Jing'an District Elder Court

"Laws Protecting the Elderly in the USA"

Special lecture to judges, November 7, 2012, Shanghai, China

American Society of Pension Professionals and Actuaries

"An ERISA Law Primer for Non-Attorneys"

And

"Back to the Future Part III: Advanced RMDs and the Impact of the Lifetime Income Proposed Regulations"

Annual Meeting, October 29 and 30, 2012, National Harbor, MD

The John Marshall Law School

"Using Advanced Directives While Young and of Sound Mind to Avoid Unwanted Medical Treatments and Property Decisions in Old Age"

Faculty Works in Progress Lecture Series, October 2, 2012, Chicago, IL

East China University of Political Science and Law

"Basic Principles of Elder Law in America"

Sino-American Research Center for Aging Populations Instillation conference, April 13, 2012, Shanghai, China

The John Marshall Law School Young Democrats Society

"Income Tax and Other Issues with Civil Unions in Illinois"

Monthly meeting, April 3, 2012, Chicago, IL

Washington University in St. Louis,

Center for the Interdisciplinary Study of Work and Social Capital

"Employee Benefits in an Era of Retrenchment"

Annual academic conference, moderator, March 29, 2012, St. Louis, MO

Elder Law and Miscellaneous Remedies Division of the Circuit Court

"Jurisdiction of the New Division in the Circuit Court of Cook County"

And

"Financing Long Term Care"

Elder Law Practice in the Circuit Court of Cook County CLE program, March 22-23, 2012, Chicago, IL

Lesbian and Gay Bar Association of Chicago

"Income Tax, Employee Benefits, Elder Law and Estate Planning Issues with Civil Unions in Illinois"

Monthly meeting, February 28, 2012, Chicago, IL

The John Marshall Law School

"Can the State Go into a Child's Wallet to Help Pay for Mom and Dad's Long Term Care? The Reemergence of Filial Support Laws"

Faculty Works in Progress Lecture Series, February 21, 2012, Chicago, IL

Association of American Law Schools

"An Objective Discussion on Public Sector Pension Plans: Focus on Retirement Adequacy for Professors and Judges"

Annual Meeting, Section on Employee Benefits, January 9, 2012, Washington DC

2011

American Society of Pension Professionals and Actuaries

"Making Sense of Required Minimum Distributions"

Annual Meeting, October 23, 2011, National Harbor, MD

Great Lakes TE/GE Council

"The Mathematical and Actuarial Analysis of Retirement"

Quarterly Meeting, July 15, 2011, Chicago, IL

National Academy of Elder Law Attorneys

"Sex and Sexuality Over Sixty"

Annual Meeting, moderator, May 21, 2011, Las Vegas, NV

2010

American Society of Pension Professionals and Actuaries

"So Now That You're Retired: What Risks Do You Face with Your Retirement Income?"

Annual Meeting, October 18, 2010, Washington, DC

American Bar Association Section of Taxation, Teaching Taxation Committee

"Employing Stock: U.S. and Foreign Taxation of Employee Stock Options"

Fall Meeting, panel organizer and moderator, September 24, 2010, Toronto, ON

Worldwide Employee Benefits Network

"An Introduction to ERISA for Benefit Professionals"

September 21, 2010, via webinar from Chicago, IL

The John Marshall Law School

"Domestic Partner Benefits in Employer Provided Health Plans: How State Taxing Authorities Are Dealing With Inconsistencies With Federal and Local State Income Tax Regimes"

8th Annual Employee Benefits Law Symposium, April 29, 2010, Chicago, IL

Association of American Law Schools

"Executive Compensation, Retirement Policy, and the Great Recession"

Annual Meeting, Section on Employee Benefits, January 6, 2010, New Orleans, LA

2009

Joint Committee on Employee Benefits

"Federal Regulation of Health Benefit Plans"

National Institute on ERISA Basics, faculty, June 11, 2009, Chicago, IL

Association of American Law Schools

"Pedagogy of Teaching Same-Sex Spouse and Domestic Partnership Issues in a Tax or Employee Benefits Class"

Annual Meeting, Section on Sexual Orientation and Gender Identity Issues, panelist, January 7, 2009, San Diego, CA

2008

American Academy of Actuaries

"The Time Horizon to Fund a Public Sector Pension Plan: Determination by Comparing Projected Pension Promises Growth to Projected Tax Base Growth"

Public Forum on Public Pension Disclosures, requested testimony, September 4, 2008, Washington, DC

American Academy of Actuaries

"Issues in §411(d)(6)"

Annual Enrolled Actuaries Meeting, April 7, 2008, Washington, DC

2007

Illinois State Bar Association

"Reporting and Disclosure Best Practices After PPA 2006"

CLE program on the Pension Protection Act of 2006, faculty, October 19, 2007, Chicago, IL

American Society of Pension Professionals and Actuaries

"Reporting and Disclosure Best Practices After PPA 2006"

And

"A Primer on ERISA Law for Enrolled Actuaries"

The ASPPA Advanced Actuarial Conference, faculty, June 5, 2007, Boston, MA

American Society of Pension Professionals and Actuaries

"Reporting and Disclosure Best Practices After PPA 2006"

The ASPPA & DOL Speaks Employee Benefits Conference, General Session, moderator and panelist, May 25, 2007, Washington, DC

National Institute of Pension Administrators

"Funding Defined Benefit Plans After PPA 2006"

Annual Forum & Expo, May 8, 2007, Las Vegas, NV

American Society of Pension Professionals and Actuaries

"Reporting and Disclosure Requirements for Qualified Plans after PPA 2006"

The IRS/ASPPA Great Lakes Benefits Conference, May 2, 2007, Chicago, IL

The John Marshall Law School

"Much Ado About the Meaning of 'Benefit Accrual': The Issue of Age Discrimination in Hybrid Cash Balance Plan Qualification Is Dying but Not Yet Dead"

Fifth Annual Employee Benefits Law Symposium, April 25, 2007, Chicago, IL

The John Marshall Law School

"Public Sector Pension Plans in Illinois: A Workshop on Determining Proper Funding Levels"

Faculty Works in Progress, February 26, 2007, Chicago, IL

2006

American Society of Pension Professionals and Actuaries

"Required Minimum Distributions for Defined Benefit Plans"

Annual Conference, October 28, 2006, Washington, DC

The John Marshall Law School

"Public Sector Pension Plans in Illinois: Will the Promises Be Kept?"

Academic conference, organizer, moderator and presenter, October 17, 2006, Chicago, IL

Chicago Bar Association Employee Benefits Committee

"Miscellaneous Provisions of the Pension Protection Act of 2006"

CLE program on the Pension Protection Act of 2006, October 12, 2006, Chicago, IL

Great Lakes TE/GE IRS Advisory Committee

"Provisions Other than Funding Under the PPA"

Quarterly meeting, Oct. 12, 2006, Chicago, IL

Sunguard-Relius

"Streamlining Benefit Distribution Options Under the Final 411(d)(6) Regulations"

And

"New Funding Rules for Defined Benefit Plans"

Advanced Pension Conference, September 28, 2006, Chicago, IL

College of Pension Actuaries

"Relative Value Regulations"

Annual Actuarial Conference, August 5, 2006, Chicago, IL

American Society of Pension Professionals and Actuaries

"Required Minimum Distributions in Defined Benefit Plans"

And

"Examining the Relative Value Rules"

The ASPPA Advanced Actuarial Conference, June 12, 2006, Boston, MA

American Society of Pension Professionals and Actuaries

"How to Eliminate Optional Forms of Benefits"

Annual IRS/ASPPA Great Lakes Benefits Conference, May 21, 2006, Chicago, IL

American Bar Association Section of Taxation, Domestic Partnership Committee

"Tax Planning for Married Same Sex Couples and Unmarried Domestic Partners – Part II: Breaking Up Is Hard To Do!"

Fall Meeting, panelist, May 11, 2006, Washington, DC

Abraham Lincoln Marovitz Inns of Court Chicago

"Illinois State Public Sector Pension Plans: The Funding Crisis"

Monthly meeting, April 16, 2006, Chicago, IL

2005

American Society of Pension Professionals and Actuaries

"Relative Value Regulations and Eliminating Optional Forms of Benefits - or Vice Versa"

Annual IRS /ASPPA Great Lakes Benefits Conference, May 20, 2005, Chicago, IL

Chicago Bar Association Financial Investment Services Committee

"Accumulation and Distribution of Retirement Assets"

"How Will the Privatization of Social Security Impact the U.S. Economy & Financial Markets?" CLE program, March 2, 2005, Chicago, IL

Chicago Bar Association Committee on the Legal Rights of Gay Men & Lesbians

"Estate Planning and Maximizing Employee Benefits for Same-Sex Couples"

Monthly meeting, January 14, 2005, Chicago, IL

2004

Chicago Actuarial Association

"What Are Reasonable Actuarial Assumptions?"

Monthly meeting, November 2004, Chicago, IL

American Society of Pension Professionals and Actuaries

"Optional Forms of Benefits: Relative Values and Eliminations"

Annual meeting, Workshop, October 2004, Washington, DC

American Law Institute

"Fiduciary Provisions and Prohibited Transactions"

28th Annual ALI-ABA Course of Study: Basic Law of Pensions, Welfare Plans, and Deferred Compensation, faculty, April 2004, Chicago, IL

The John Marshall Law School

"Cash Balance Plans: An Integral Component of the Defined Benefit Plan Renaissance"

Second Annual Employee Benefits Law Review Symposium, April 2004, Chicago, IL

2003

Chicago Bar Association Young Lawyers Section Employee Benefits Committee

"The Cash Balance Plan: Is It Part of the Defined Benefit Plan Renaissance"

Monthly meeting, September 2003, Chicago, IL

Joint Committee on Employee Benefits

"Federal Regulation of Health Benefit Plans – Overview"

Annual National Institute on ERISA Basics, faculty, May 2003, Chicago, IL

Chicago Bar Association Young Lawyers Section

"A Balanced Discussion on the Unauthorized Practice of Law"

CLE seminar, moderator and coordinator, April 2003, Chicago, IL

2002

International Congress of Actuaries World Congress

"Using A Target Benefit Approach to Funding Private Social Security Individual Accounts"

Future of Social Security panel, April 16, 2002, Cancun, Mexico

Chicago Bar Association Young Lawyers Section Estate Planning Committee

"Proper Beneficiary Designations"

"IRAs: What You Need to Know When Creating an Estate Plan for Your Clients" CLE Seminar, faculty, October 2002, Chicago, IL

Chicago Bar Association Committee for the Legal Rights of Gay Men & Lesbians

"Current Developments in Domestic Partner Benefits"

Monthly meeting, February 2002, Chicago, IL

Chicago Bar Association Young Lawyers Section Employee Benefits Committee

"What ERISA Attorneys Need to Know about the Enrolled Actuary's Valuation and Report"

Monthly meeting, January 2002, Chicago, IL

2001

American Bar Association Law Student Division

"The Making of the New Tax Law: A Review of the Bush Plan and How it Effects Young Lawyers"

Annual meeting, August 2001, Chicago, IL

American Bar Association Section of Taxation Young Lawyers Forum

"The Myths and Realities of Tax and Employee Benefits Law"

Annual meeting, panelist, August 2001, Atlanta, GA

Chicago Bar Association Young Lawyers Section Estate Planning Committee

"Estate Planning Aspects of the New Required Minimum Distribution Proposed Regulations"

Monthly meeting, January 2001, Chicago, IL

1999

Chicago Bar Association Young Lawyers Section Estate Planning Committee

"Employee Benefit Plan Issues"

"Choice of Entity Concerns During the Life Cycle of a Small Business" CLE Seminar, organizer, moderator and panelist, December 1999, Chicago, IL

Chicago Bar Association Young Lawyers Section Estate Planning Committee

"How Social Security Benefits Might Effect the Estate Planning of American Citizens Who Work Abroad"

Monthly meeting, November 1999, Chicago, IL

Chicago Bar Association Employee Benefits Committee

"Cash Balance Plans - An Insider's View"

Monthly meeting, October 1999, Chicago, IL

1997

Chicago Bar Association Young Lawyers Section Estate Planning Committee

"IRA Planning After TRA 1997"

Monthly meeting, October 1997, Chicago, IL

MEDIA EXPOSURE

2019

SHRM.org HR Magazine

Joanne Sammer, "Benefits of Long Term Care Insurance"

Quoted in article, published February 27, 2019 (Spring 2019 edition of magazine)

US News

Rachel Hartman, "Is Phased Retirement a Good Fit for You?"

Quoted in article, published January 23, 2019

2018

US News

Rachel Hartman, "What is a Health Savings Account? Understand the details involved with health savings accounts before opening one"

Quoted in article, published December 5, 2018

Investor's Business Daily

Paul Katzeff, "Medicare Open Enrollment: 5 Key Steps for Choosing the Best Coverage"

Quoted in article, published October 25, 2018

US News

Rachel Hartman, "7 Myths About Social Security"
Quoted in article, published June 13, 2018

Investor's Business Daily

Paul Katzeff, "How To Apply For Social Security Benefits: What You Need To Know"
Quoted in article, published May 21, 2018

SHRM.org

Stephen Miller, "SEC's Investment Advice Proposal Upends Fiduciary Debate"
Quoted in article, published April 26, 2018

US News

Rebecca Lake, "Give Your 401(k) a New Year's Checkup"
Quoted in article, published January 3, 2018

2017**FiduciaryNews.com**

Christopher Carosa, "Guidelines for Minor Children: How to Avoid a Personal Retirement Crisis"
Quoted in article, published September 26, 2017

US News

Rebecca Lake, "What You Should Know About Inherited IRAs - Managing an Inherited IRA Could Trigger a Hefty Tax Penalty"
Quoted in article, published September 22, 2017

FiduciaryNews.com

Christopher Carosa, "401k Rollovers: To Roth or Not to Roth - 7 Fiduciary Questions"
Quoted in article, published August 8, 2017

US News

Rebecca Lake, "How Americans Can Reverse Their Biggest Retirement Savings Regret: A Late Start on Retirement Savings Isn't a Deal Breaker - Here's How to Make Up for Lost Time"
Quoted in article, published July 7, 2017

US News

Jeff Brown, "Should I Choose an Annuity or Pension in Retirement? The Decision Usually is Binding and Several Factors Should Be Considered"
Quoted in article, published June 21, 2017

Financial Advisor

Ben Steverman, "How Much Should You Save for Retirement: Here's what the experts say"
Quoted in article, published June 14, 2017

US News

Brian O'Connell, "Harry Markowitz Should Be a Household Name: Modern portfolio theory is all about managing risk, and that's a big deal for retirement investors"

Quoted in article, published June 12, 2017

CNBC.com

Tom Anderson, "Ditch the 4 percent rule: Here's how to handle your retirement withdrawals"

Quoted in article, published June 1, 2017

US News

Rebecca Lake, "3 Ways to Manage Retirement Planning Stress: Knowing what your goals are and how to achieve them can relieve some of your anxiety"

Quoted in article, published May 26, 2017

CNBC.com

Tom Anderson, "Five ways to bulletproof your estate plan"

Quoted in article, published April 7, 2017

NextAvenue.com

Richard Eisenberg, "Probate, Wills, Executors: Your Estate Planning Questions Answered: Estate planning experts weigh in on these common concerns"

Quoted in article, published April 7, 2017

2011

Chicago Bar Association

"Illinois Public Sector Plans"

Guest, "Justice and Law Weekly," aired on WYCC Channel 20 TV, PBS on June 12, 2011, Chicago, IL

2010

Pew Center on the States

"The Trillion Dollar Gap: Underfunded State Retirement Systems and the Road to Reform"

Provided commentary and quoted in the report

SERVICE TO THE PROFESSION

American Society of Pension Professionals and Actuaries

- ASPPA Annual Conference Planning Committee
 - o Member, 2012–2014
- "The Plan Consultant" (currently called ASPPA Journal)
 - o Editorial Board, 2006–2013
 - o Senior Editor, 2005–2006
- asap communications committee
 - o Chair, 2004–2006
- ASPPA Great Lakes Benefits Conference
 - o Executive Committee, Member, 2004–2013

American Bar Association Section of Labor & Employment Law

- Welfare Plans–Technical and Statutory Regulations Subcommittee of the Employment Benefits Committee
 - Co-Chair, 2010–2013
- Employee Benefits Law (published by BNA)
 - Chapter Rewrite Editor, 2005–2006

American Bar Association Section of Real Property, Trust, and Estate Law

- Long Term Care, Medicaid, and Special Needs Trusts Committee of the Elder Law, Disability Planning and Bioethics Group
 - Vice-Chair, 2011–2013

American Bar Association Section of Taxation

- Membership and Marketing Committee
 - Vice-Chair, 2009–2012
- “Important Developments in Employee Benefits Law”
 - Section of Employee Benefits, Editor, 2008–2012
- “The Practical Tax Lawyer”
 - Editorial Board, 2005–2008
- Young Lawyers Forum
 - Chair, 2003–2005

Association of American Law Schools

- Section of Law and Mental Disability
 - Programming Chair, 2014–2015
- Section on Employee Benefits
 - Chair, 2011–2012
- Section on Aging Law
 - Chair, 2012–2013
- Section on Post-Graduate Legal Education
 - Executive Committee and Mentorship Chair, 2012-2013

Chicago Bar Association

- Board of Managers
 - Member, 2009–2011
- Employee Benefits Committee
 - Chair, 2009–2010
- Financial and Investment Services Committee
 - Chair, 2005–2006
- Finance Committee of the Board of Managers
 - Pro Bono Employee Benefits Council, 2010–2018
 - Member, 2004–2018
- Association's Officers Nominating Committee
 - Member, 2004–2007

- Young Lawyers Section
 - o Treasurer, 2003–2004
 - o Director, 2001–2003
 - o Employee Benefits Committee, Founding Chair, 2000–2002
 - o Estate Planning Committee, Co-Chair, 1999–2000

Chicago Sister Cities International, China Committee

- Shanghai Social Exchange Subcommittee of the China Committee
 - o Co-Chair, 2013–2018
 - o Co-leader of delegation of 8 Chicagoan professionals that travelled to Shanghai to learn how they provide support to their aging population, 2017

Elder Law and Miscellaneous Remedies Division of the Cook County Circuit Court

- Legal Support Subcommittee, 2011–Present
- Training and Education Subcommittee, 2011–Present
- Advisory Task Force for Development and Installation of the new Division, 2010–Present

National Academy of Elder Law Attorneys (NAELA)

- NAELA Illinois chapter
 - o Member of Board of Directors, 2012–2013
- “NAELA Journal”
 - o Student Articles Editor, 2010–2012
- Academic committee
 - o Member, 2010–2012
- “NAELA News”
 - o Editorial Board, 2011–2012

National Association of Stock Plan Professionals, Chicago Chapter

- website coordinator, 2019-Present

Retirement Income Industry Association

- Research committee, 2015–2017
- Special Advisor to the Board, 2010–2017

Society for Human Resource Management

- Member National Society, 2016–Present
- Member of the Chicago chapter, 2016–2018

Society of Financial Services Professionals, Greater Chicago Chapter

- Board of Directors
 - o Director of Professional Advancement, 2017–Present
 - o Member, 2016–Present
 - o Director of Membership, 2016
- University Partners Program
 - o Faculty Liaison for The John Marshall Law School, 2012–2015

SERVICE TO THE COMMUNITY

AidsCare

- Member, Board of Directors, 2001–2005

Center for Disability & Elder Law

- Volunteer, coordinator of law students who work at the Pro Se Guardianship Help Desk for externship credit hours, 2010–2013

Center on Halsted, LGBTQ Seniors housing and support project

- Volunteer, 2018–Present

Chicago Bar Foundation

- Member, Young Professionals Board, 2003–2005

Circuit Court of Cook County Elder Justice Center

- Volunteer Attorney, 2015–2016
- Supervisor of law student interns, 2013–2014

East China University of Political Science and Law's Research Center for People with Disabilities

- Member of the Advisory Board, 2014–Present

Illinois Supreme Court Commission on Professionalism's Lawyer-to-Lawyer program

- Official Professional Mentor to various newly-admitted attorneys, 2011–2014

Rush University

- Member of Data Safety Monitoring Board for a National Institute of Health-funded suicide intervention project in Chicago's Chinese community, 2014–Present

Serving Our Seniors program (The American Bar association Young Lawyer's Division's 2010- 2011 national public service project)

- Volunteer, editor of the training manual, 2010–2011

VITA tax payer assistance program, The John Marshall Law School

- Volunteer, 2010–2013