

Barry Kozak

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Education

Doctor of Philosophy (PhD) - Disability Studies

University of Illinois at Chicago, College of Applied Science • Chicago, IL
matriculated 2011, *currently on voluntary leave of absence*

Master of Public Policy (MPP) with a specialization in Taxation Policy

University of Chicago, Harris School of Public Policy Studies • Chicago, IL
received 2009

Master of Legal Letters (LLM) in Employee Benefits law

UIC John Marshall Law School • Chicago, IL
received 2000

Juris Doctorate (JD) in general transactional law

UIC John Marshall Law School • Chicago, IL
received 2000

Bachelor of Science (BS) in Applied Statistics

The State University of New York • Albany, NY
1987 (received 1994, *in absentia*)

Professional Designations

Retirement Income Certified Professional

The American College of Financial Services, Bryn Mawr, PA
awarded 2018; *active, and renewed for 2020*

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>

Notary Public

Office of the Illinois Secretary of State, Springfield, IL
awarded 2016; *active, and renewed for 2020*

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>

Certified Pension Consultant

American Society of Pension Professionals & Actuaries, Arlington, VA
awarded 2001; *voluntarily inactivated in 2017*

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>

Attorney

The Supreme Court of the State of Illinois, Springfield, IL
awarded 2000; *active, and renewed for 2020*

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>

Chartered Financial Consultant

The American College of Financial Services, Bryn Mawr, PA
awarded 1996; *active, and renewed for 2020*

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>

Enrolled Actuary

U.S. Department of the Treasury, Washington, DC
awarded 1995; *voluntarily inactivated in 2000*

An Enrolled Actuary may perform actuarial services required under ERISA or regulations thereunder.
<https://www.irs.gov/tax-professionals/enrolled-actuaries/enrolled-actuary-information>

General Securities Representative

Financial Industry Regulatory Authority, Washington, DC
awarded 1995; *voluntarily inactivated in 1996*

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

Financial Industry Regulatory Authority, Washington, DC
awarded 1995; *voluntarily inactivated in 1996*

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>

Life and Health Insurance Broker

New York State Department of Financial Services, Albany, NY

awarded 1990; *voluntarily inactivated in 1996*

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 Awards

Spring 2017 Distinguished Scholar in Residence in elder law and financial gerontology

Loyola University Chicago School of Law, Chicago, IL

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

2012 Distinguished Service Award recipient

The John Marshall Law School Alumni Association, Chicago, IL

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.

Featured Author, August 2011

Bloomberg BNA Tax & Accounting, Washington, DC

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

Recipient of several "**Unsung Hero**" Awards between 2001 and 2007

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

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 Nolan Fellow (member of its inaugural class)

The American Bar Association Section of Taxation, Washington, DC

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 Law Student Ambassador of the Year

The John Marshall Law School, Chicago, IL

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

Financial Wellness Educator and Consultant (and Sole proprietor), 2019 - present

Retirement HELP, Inc., Chicago, IL (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

- Educate employees of small businesses about financial wellness;
- Support Human Resources Departments in their communication of employee benefit programs; and
- Assist financial service professionals as a subject matter expert in financial wellness, retirement readiness, and estate planning issues

ERISA Regulatory Consultant and Financial Wellness Consultant, 2017 - 2019

October Three Actuarial Consultants LLC, Chicago, IL

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

- Hired specifically to develop the content and market strategy for financial wellness and age-friendly workforce management services;
- Participated in marketing, communicating, and ensuring the legal compliance of our client's cash balance pension plans;
- Served as an expert on non-pension benefits, such as executive compensation, health & welfare, ACA, HIPAA, COBRA, FMLA; and
- Created an internal onboarding summary document which communicates our internal employee benefit programs available to new employees

Elder and Estate Planning Attorney, 2015 – 2017

Law Offices of Barry Kozak, Chicago, IL

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

- Assisted families in discovering and memorializing their retirement, end-of-life and legacy goals;
- Assisted families in understanding the benefits they were entitled to from retirement plans and IRAs; and
- Established synergistic relationships with financial service professionals

Director of the Elder Law program, 2010 – 2015

UIC John Marshall Law School, Chicago, IL

UIC John Marshall Law School is fully accredited law school that offers JD and several LLM degrees to law students and several MJ graduate degrees to non-attorney professionals. Prior to August 2019, the law school was independent and not yet part of the University of Illinois at Chicago

- Developed the JD Certificate program in Elder Law (which requires 20 of the total 90 credit hours needed for the JD degree)
- 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 appropriate adjunct professors to teach classes, counselling students enrolled in the program, and forming an Advisory Board
- Operated programs and special events within institutional budgets
- Adopted mind mapping software to support my mentorship of student progress and goals
- 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
- 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)
- Reported directly to the Dean

Associate Director of the graduate Tax Law & Employee Benefits programs, 2001-2005 (part-time), 2005-2010

UIC John Marshall Law School, Chicago, IL

UIC John Marshall Law School is fully accredited law school that offers JD and several LLM degrees to law students and several MJ graduate degrees to non-attorney professionals. Prior to August 2019, the law school was independent and not yet part of the University of Illinois at Chicago

- Operated programs and special events within institutional budgets
- Organized major conferences and smaller career-oriented programs
- Served as faculty advisor for independent research papers for JD, LLM and MS students (all students needed to produce and defend an academic or policy paper, and the Director of the program assigned about half of the students to work with me as they developed and presented their research)
- Worked with a different student editor selected each semester to produce a substantive newsletter
- 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
- Reported to the Director of the program, and performed other ad hoc duties as needed

Technical Education Consultant, 2005 (part-time)

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

The American Society of Pension Professionals & Actuaries (ASPPA) is part of the American Retirement Association is a non-profit national organization for retirement plan professionals and one of its 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, IL

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

ERISA Consultant, 2001 - 2005 (part-time)

CCA Strategies, Chicago, IL

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, 401(k) plans, and ESOPs;
- Educated the firm about the ever-changing landscape of ERISA governance and trending policy issues for employee benefits; and
- Cultivated public data to help develop strategic and proprietary best practices for the firm and for individual actuaries

ERISA Associate Attorney, 2000 - 2001

Bell, Boyd & Lloyd, LLC, Chicago, IL

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

- Researched issues, drafted documents, analyzed ROI, and educated clients about their retirement benefit plans, health and welfare benefit plans, group insurance programs, and other employee benefit plans and programs;
- Performed due diligence of employee benefits issues for business transactions, such as mergers and acquisitions issues;
- Reviewed Requests for Proposals and negotiated contracts for vendors on behalf of clients; and
- Supervised several junior and summer associates

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

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

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, IL

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, IL

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, NY

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, NY

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, NY

Pay Plans, now based in Greenlawn, NY, 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, NY

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, NY

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

Adjunct Professor of Law

UIC John Marshall Law School, Chicago, IL

2000 - present

- 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)

Adjunct Professor of Law

Loyola University Chicago School of Law, Chicago, IL
2015 – 2017

- Elder Law
- Financing an Aging Population

Visiting Lecturer

East China University of Political Science and Law, Shanghai, China
Spring 2014

- 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)

Adjunct Professor of Law

DePaul University College of Law, Chicago, IL
2010 - 2012

- Employee Benefits Law

Textbooks, Treatises, and Book Chapters

2010

“Employee Benefit Plans”

Carolina Academic Press

- Author, Textbook and Teachers Edition

“Employee Benefit Plans and Issues for Small Employers”

Bloomberg BNA Tax Management Compensation Planning Portfolios, 353-4th T.M.

- Author, complete rewrite of 3rd edition

2009

“CPA’s Guide to Retirement Plans for Small Businesses”

American Institute for Certified Public Accountants

- 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

“The 457 Answer Book”

Aspen Publishers

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

Published Articles

2019

“The Suitability of Market Return Cash Balance Pension Plans”

NYU Review of Employee Benefits and Executive Compensation
Chapter 10

2018

“Phased Retirement Programs as Part of an Age-Friendly Business Strategy”

Benefits Law Journal
Vol. 31, No. 4

“Revisiting the CLASS Act: LTC as an Employee Benefit”

Benefits Quarterly (through International Foundation of Employee Benefit Plans)
Vol. 34, No. 3

“Employers Should Consider a Single Plan Document with Pension Benefits and Employee Salary Deferrals”

Society of Actuaries
Securing Future Retirements Essay Collection on the soa.org website

2017

“PBGC Premiums: A Necessary Overhead Cost for Defined Benefit Plan Sponsors That Should Be Minimized”

The Benefits Law Journal
Vol. 30, No. 2, p. 16

“Time to Ditch the Three-Legged Stool Analogy for Retirement and Replace it with a Two-Picture Analogy: A Mailbox and a Piggy Bank”

Society of Actuaries
Financial Wellness Essay Collection on the soa.org website

“Over the Years, Insurance has Become an Important Employee Benefit”

Tax Management Compensation Planning Journal
Vol. 45, No. 5, p. 152

2016

“Qualified Retirement Planning Services to Your Clients: A New Fringe Benefit for Their Employees and a New Profit Center for You”

The Benefits Law Journal
Vol. 29, No. 4, p. 56

“The Forgotten Rule of Professional Conduct – Representing a Client with Diminished Capacity”

Creighton Law Review
Vol. 49, p. 827

2014

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

Journal of Pension Planning & Compliance
Vol. 39, p. 1

2013

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

Benefits Law Journal
Vol. 26, No. 4, p. 12

2011

“White Paper: How Congress Can Amend the Code to Make Target Benefit Plans More Attractive to Employers”
NYU Review of Employee Benefits and Executive Compensation

“Teaching On-Line Has Been a Great Experience for Me (Hopefully for My Students as Well)”
The Law Teacher
Vol. 18, No. 3, p. 34

“Civil Unions in Illinois: Issues That Illinois Attorneys Should Consider”
The Chicago Bar Record
April 2011 edition

2010

“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”
NYU Review of Employee Benefits and Executive Compensation

“Illinois Gets a Grade of ‘Zero’ for Pension Plans Funding”
The Chicago Daily Law Bulletin
March 5, 2010 edition

2008

“The Funding of Public Sector Pension Plans: Are They Truly in Crisis Mode?”
The Benefits Law Journal
Vol. 21, No. 4, p. 23

“Current Initiatives by IRS to Assist Small Employers that Adopt Pre-Approved Qualified Retirement Plan Documents”
BNA Tax & Accounting, Insights and Commentary
October 2008 edition

“Reporting and Disclosure Issues with Small Employer Employee Benefit Plans”
BNA Tax & Accounting, Insights and Commentary
August 2008 edition

“Clarifying Qualification Requirements for Eligible Government Plans: IRS Increases Education and Compliance Efforts”
CCH Pension Plan Guide, Benefit Practice Portfolios
July 2008 edition

2007

“Sections 415 and 401(a)(17) Harmonized: Bad News for Qualified Retirement Plans, But Potentially Good News for Nonqualified Excess Benefit Plans”
BNA Tax Planning and Compensation Journal
December 2007 edition

“Communicating Benefits Promised: Best Practices for Meeting ERISA's Disclosure Requirements”
CCH Pension Plan Guide, Benefit Practice Portfolios
July 2007 edition

“Are Cash Balance Arrangements Age Discriminatory? The Seventh Circuit and Congress Say No, But Questions Remain”
The Journal of Pension Benefits
Vol. 14, p.11

“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)”

The ASPPA Journal
Spring 2007 edition

2006

“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”

Employee Benefits and Executive Compensation:
Proceedings of New York University's 59th Annual Conference on Labor

“The Final Word on the Disclosure of Relative Values”

The ASPPA Journal
September/October 2006 edition

2005

“The New Rules for Nonqualified Deferred Compensation Plans”

The ASPPA Journal
March/April 2005 edition

“Revisiting the Reasonableness of Actuarial Assumptions in Defined Benefit Plans After EGTRRA and its Resulting Treasury Regulations”

Tax Management Compensation Planning Journal
Vol. 33, No. 3, p. 90

2004

“Cash Balance Plans: An Integral Part of the Defined Benefit Plan Renaissance”

The John Marshall Law Review, Employee Benefits Law Symposium edition
Vol. 37, p. 753

“Cash Balance Plans: Still a Good Program if We Look to the Logic from *Eaton* and *BankBoston* Rather than from *IBM*”

The Journal of Pension Benefits
Vol. 11, p. 29

2002

“How Plan Administrators Need to Review Qualified Domestic Relations Orders (QDROs)”

The ASPA Journal
November/December 2002 edition

“At the Crossroads: The Intersection of Pregnancy Tests, a Deceased Baby and Medical Privacy Rights”

The CBA Record
September 2002 edition

“The New Required Minimum Distribution Rules - Simpler Than the Old Rules, But Still Not Simple”

The Carolina Business Journal
July 2002 edition

2001

“Re-employment and Other Rights of Employees Who Go on Uniformed Service Leave Under USERRA”

The CBA Record
November 2001 edition

Presentations

2020

“Opportunities and Required Minimum Distributions After SECURE Act 2019”

Greater Chicago Chapter of the Society of Financial Services Professionals
Quarterly meeting, January 14, 2020, Oakbrook, IL

2019

“Retirement Planning Basics”

University of Chicago Alumni Career Programs - Webinar
November 13, 2019 (recorded and available to University of Chicago Alumni)

“Market Return Cash Balance Plans in Corporate America”

Eighth Annual Employee Benefits Law Academic Conference
March 29, 2019, Champaign, IL

2018

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

Seventh Annual Employee Benefits Law Academic Conference
April 13, 2018, Oklahoma City, OK

2017

“The Legal Definition of Diminished Mental Capacity Under American Law”

East China University of Political Science and Law
Special lecture to faculty and graduate students, October 18, 2017, Shanghai, China

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

Los Angeles chapter of the National Association of Stock Plan Professionals
Monthly meeting, April 25, 2017, via webinar from Chicago, IL

“Legal Issues with Family Caregivers”

American Society on Aging
Annual Aging in America conference, March 22, 2017, Chicago, IL

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

Chicago chapter of the National Association of Stock Plan Professionals
Monthly meeting, March 14, 2017, Chicago, IL

2016

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

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

“How the Affordable Care Act is Affecting Medicare and Medicaid”

Illinois Institute of Continuing Legal Education
Annual Short course on Elder Law conference, November 4, 2016, Lisle, IL

“Legal Considerations”

Alzheimer’s Association and Age Options
Annual Alzheimer’s Conference, May 3, 2016, Orland Park, IL

“Succession Planning - Effective Retirement Strategies”

And

“Long Term Care - Emerging Issues for Your Boomer Clients”

Greater Chicago Chapter of the Society of Financial Services Professionals
45th Annual Sales Forum for Financial Professionals, March 22, 2016, Wheeling, IL

“Family Caregivers: Legal Issues and Other Challenges”

CBA/WBAI Joint Task Force on Women and Aging

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

2015

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

Chicago Bar Association Elder Law Committee

Monthly meeting, November 13, 2015, Chicago, IL

“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?”

Law & Society Association

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

“Rethinking Government's Role in Securing a Financially Sound Retirement”

Fourth Annual Employee Benefits Law Academic Conference

March 27, 2015, Philadelphia, PA

“Elder Justice Center: An Innovative Response to Vulnerable Older Adults”

American Society on Aging

Annual conference, March 25, 2015, Chicago, IL

2014

“The Draft Chicago Declaration on the Rights of Older Persons”

United Nations Open-Ended Working Group on Ageing

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

“Limited Guardianship”

3rd World Congress on Adult Guardianship

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

“Representing Clients with Diminished Mental Capacity”

Chicago Bar Association Elder Law Committee

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

“The Legal Framework of Mental Capacity”

Illinois Guardianship Association

Annual conference, September 18, 2014, Chicago, IL

2013

“Elder Abuse in the USA”

Jiawang People's District Court

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

“Financing Retirement in the USA”

East China University of Political Science and Law

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

“Global Aging Populations: Issues and Solutions”

Illinois Governor's Conference on Aging and Disability

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

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

American Society of Pension Professionals and Actuaries

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

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

The John Marshall Law School

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

“Decisional Capacity”

Continuing Education Institute of Illinois

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

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

American Society of Pension Professionals and Actuaries

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

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

Chicago Junior Law Faculty Workshop

April 5, 2013, Chicago, IL

“Advanced Directives and Guardianship”

Illinois Institute of Continuing Legal Education

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

“Best Practices in Online LL.M. Programs”

Association of American Law Schools

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

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

Association of American Law Schools

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

“Elderly Individuals with Diminished Capacity”

East China University of Political Science and Law

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

“Laws Protecting the Elderly in the USA”

Jing'an District Elder Court

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

“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”

American Society of Pension Professionals and Actuaries

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

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

The John Marshall Law School

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

“Basic Principles of Elder Law in America”

East China University of Political Science and Law

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

“Income Tax and Other Issues with Civil Unions in Illinois”

The John Marshall Law School Young Democrats Society

Monthly meeting, April 3, 2012, Chicago, IL

“Employee Benefits in an Era of Retrenchment”

Washington University in St. Louis, Center for the Interdisciplinary Study of Work and Social Capital

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

“Jurisdiction of the New Division in the Circuit Court of Cook County”

And

“Financing Long Term Care”

Elder Law and Miscellaneous Remedies Division of the Circuit Court

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

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

Lesbian and Gay Bar Association of Chicago

Monthly meeting, February 28, 2012, Chicago, IL

“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”

The John Marshall Law School

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

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

Association of American Law Schools

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

2011

“Making Sense of Required Minimum Distributions”

American Society of Pension Professionals and Actuaries

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

“The Mathematical and Actuarial Analysis of Retirement”

Great Lakes TE/GE Council

Quarterly Meeting, July 15, 2011, Chicago, IL

“Sex and Sexuality Over Sixty”

National Academy of Elder Law Attorneys

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

2010

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

American Society of Pension Professionals and Actuaries

Annual Meeting, October 18, 2010, Washington, DC

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

American Bar Association Section of Taxation, Teaching Taxation Committee

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

“An Introduction to ERISA for Benefit Professionals”

Worldwide Employee Benefits Network

September 21, 2010, via webinar from Chicago, IL

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

The John Marshall Law School

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

“Executive Compensation, Retirement Policy, and the Great Recession”

Association of American Law Schools

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

2009

“Federal Regulation of Health Benefit Plans”

Joint Committee on Employee Benefits

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

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

Association of American Law Schools

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

2008

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

American Academy of Actuaries

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

“Issues in §411(d)(6)”

American Academy of Actuaries

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

2007

“Reporting and Disclosure Best Practices After PPA 2006”

Illinois State Bar Association

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

“Reporting and Disclosure Best Practices After PPA 2006”

And

“A Primer on ERISA Law for Enrolled Actuaries”

American Society of Pension Professionals and Actuaries

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

“Reporting and Disclosure Best Practices After PPA 2006”

American Society of Pension Professionals and Actuaries

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

“Funding Defined Benefit Plans After PPA 2006”

National Institute of Pension Administrators

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

“Reporting and Disclosure Requirements for Qualified Plans after PPA 2006”

American Society of Pension Professionals and Actuaries

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

“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 John Marshall Law School

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

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

The John Marshall Law School

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

2006

“Required Minimum Distributions for Defined Benefit Plans”

American Society of Pension Professionals and Actuaries

Annual Conference, October 28, 2006, Washington, DC

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

The John Marshall Law School

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

“Miscellaneous Provisions of the Pension Protection Act of 2006”

Chicago Bar Association Employee Benefits Committee

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

“Provisions Other than Funding Under the PPA”

Great Lakes TE/GE IRS Advisory Committee
Quarterly meeting, Oct. 12, 2006, Chicago, IL

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

And
“New Funding Rules for Defined Benefit Plans”

Sunguard–Relius
Advanced Pension Conference, September 28, 2006, Chicago, IL

“Relative Value Regulations”

College of Pension Actuaries
Annual Actuarial Conference, August 5, 2006, Chicago, IL

“Required Minimum Distributions in Defined Benefit Plans”

And
“Examining the Relative Value Rules”
American Society of Pension Professionals and Actuaries
The ASPPA Advanced Actuarial Conference, June 12, 2006, Boston, MA

“How to Eliminate Optional Forms of Benefits”

American Society of Pension Professionals and Actuaries
Annual IRS/ASPPA Great Lakes Benefits Conference, May 21, 2006, Chicago, IL

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

American Bar Association Section of Taxation, Domestic Partnership Committee
Fall Meeting, panelist, May 11, 2006, Washington, DC

“Illinois State Public Sector Pension Plans: The Funding Crisis”

Abraham Lincoln Marovitz Inns of Court Chicago
Monthly meeting, April 16, 2006, Chicago, IL

2005

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

American Society of Pension Professionals and Actuaries
Annual IRS /ASPPA Great Lakes Benefits Conference, May 20, 2005, Chicago, IL

“Accumulation and Distribution of Retirement Assets”

Chicago Bar Association Financial Investment Services Committee
“How Will the Privatization of Social Security Impact the U.S. Economy & Financial Markets?” CLE program,
March 2, 2005, Chicago, IL

“Estate Planning and Maximizing Employee Benefits for Same-Sex Couples”

Chicago Bar Association Committee on the Legal Rights of Gay Men & Lesbians
Monthly meeting, January 14, 2005, Chicago, IL

2004

“What Are Reasonable Actuarial Assumptions?”

Chicago Actuarial Association
Monthly meeting, November 2004, Chicago, IL

“Optional Forms of Benefits: Relative Values and Eliminations”

American Society of Pension Professionals and Actuaries
Annual meeting, Workshop, October 2004, Washington, DC

“Fiduciary Provisions and Prohibited Transactions”

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

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

The John Marshall Law School

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

2003

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

Chicago Bar Association Young Lawyers Section Employee Benefits Committee

Monthly meeting, September 2003, Chicago, IL

“Federal Regulation of Health Benefit Plans – Overview”

Joint Committee on Employee Benefits

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

“A Balanced Discussion on the Unauthorized Practice of Law”

Chicago Bar Association Young Lawyers Section

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

2002

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

International Congress of Actuaries World Congress

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

“Proper Beneficiary Designations”

Chicago Bar Association Young Lawyers Section Estate Planning Committee

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

“Current Developments in Domestic Partner Benefits”

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

Monthly meeting, February 2002, Chicago, IL

“What ERISA Attorneys Need to Know about the Enrolled Actuary’s Valuation and Report”

Chicago Bar Association Young Lawyers Section Employee Benefits Committee

Monthly meeting, January 2002, Chicago, IL

2001

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

American Bar Association Law Student Division

Annual meeting, August 2001, Chicago, IL

“The Myths and Realities of Tax and Employee Benefits Law”

American Bar Association Section of Taxation Young Lawyers Forum

Annual meeting, panelist, August 2001, Atlanta, GA

“Estate Planning Aspects of the New Required Minimum Distribution Proposed Regulations”

Chicago Bar Association Young Lawyers Section Estate Planning Committee

Monthly meeting, January 2001, Chicago, IL

1999

“Employee Benefit Plan Issues”

Chicago Bar Association Young Lawyers Section Estate Planning Committee

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

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

Chicago Bar Association Young Lawyers Section Estate Planning Committee

Monthly meeting, November 1999, Chicago, IL

“Cash Balance Plans - An Insider's View”

Chicago Bar Association Employee Benefits Committee
Monthly meeting, October 1999, Chicago, IL

1997

“IRA Planning After TRA 1997”

Chicago Bar Association Young Lawyers Section Estate Planning Committee
Monthly meeting, October 1997, Chicago, IL

Media Exposure

2019

Joanne Sammer, **“Benefits of Long Term Care Insurance”**

SHRM.org HR Magazine
Quoted in article, published February 27, 2019 (Spring 2019 edition of magazine)

Rachel Hartman, **“Is Phased Retirement a Good Fit for You?”**

US News
Quoted in article, published January 23, 2019

2018

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

US News
Quoted in article, published December 5, 2018

Paul Katzeff, **“Medicare Open Enrollment: 5 Key Steps for Choosing the Best Coverage”**

Investor's Business Daily
Quoted in article, published October 25, 2018

Rachel Hartman, **“7 Myths About Social Security”**

US News
Quoted in article, published June 13, 2018

Paul Katzeff, **“How To Apply For Social Security Benefits: What You Need To Know”**

Investor's Business Daily
Quoted in article, published May 21, 2018

Stephen Miller, **“SEC's Investment Advice Proposal Upends Fiduciary Debate”**

SHRM.org
Quoted in article, published April 26, 2018

Rebecca Lake, **“Give Your 401(k) a New Year's Checkup”**

US News
Quoted in article, published January 3, 2018

2017

Christopher Carosa, **“Guidelines for Minor Children: How to Avoid a Personal Retirement Crisis”**

FiduciaryNews.com
Quoted in article, published September 26, 2017

Rebecca Lake, **“What You Should Know About Inherited IRAs - Managing an Inherited IRA Could Trigger a Hefty Tax Penalty”**

US News
Quoted in article, published September 22, 2017

Christopher Carosa, **“401k Rollovers: To Roth or Not to Roth - 7 Fiduciary Questions”**
FiduciaryNews.com

Quoted in article, published August 8, 2017

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”**

US News

Quoted in article, published July 7, 2017

Jeff Brown, **“Should I Choose an Annuity or Pension in Retirement? The Decision Usually is Binding and Several Factors Should Be Considered”**

US News

Quoted in article, published June 21, 2017

Ben Steverman, **“How Much Should You Save for Retirement: Here's what the experts say”**

Financial Advisor

Quoted in article, published June 14, 2017

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”**

US News

Quoted in article, published June 12, 2017

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

CNBC.com

Quoted in article, published June 1, 2017

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”**

US News

Quoted in article, published May 26, 2017

Tom Anderson, **“Five ways to bulletproof your estate plan”**

CNBC.com

Quoted in article, published April 7, 2017

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

NextAvenue.com

Quoted in article, published April 7, 2017

2011

“Illinois Public Sector Plans”

Chicago Bar Association

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

2010

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

Pew Center on the States

Provided commentary and quoted in the report

Service to the Profession

American Society of Pension Professionals and Actuaries

ASPPA Annual Conference Planning Committee

- Member, 2012–2014

“The Plan Consultant” (currently called ASPPA Journal)

- Editorial Board, 2006–2013
- Senior Editor, 2005–2006

"asap" communications committee

- Chair, 2004–2006

ASPPA Great Lakes Benefits Conference

- 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 Bloomberg 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”

- 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

- Treasurer, 2003–2004
- Director, 2001–2003
- Employee Benefits Committee, Founding Chair, 2000–2002

- Estate Planning Committee, Co-Chair, 1999–2000

Chicago Sister Cities International, China Committee

Shanghai Social Exchange Subcommittee of the China Committee

- Co-Chair, 2013–2018
- 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, 2011–2015
- Training and Education Subcommittee, 2011–2015
- Advisory Task Force for Development and Installation of the new Division, 2010–2015

National Academy of Elder Law Attorneys (NAELA)

NAELA Illinois chapter

- Member of Board of Directors, 2012–2013

“NAELA Journal”

- Student Articles Editor, 2010–2012

Academic committee

- Member, 2010–2012

“NAELA News”

- Editorial Board, 2011–2012

National Association of Stock Plan Professionals, Chicago Chapter

- website coordinator, 2019

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

- Member, 2016–Present

University Partners Program

- 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 taxpayer assistance program, The John Marshall Law School

- Volunteer, 2010–2013