

# Barry Kozak

barrykozak@gmail.com | Full C.V. available at [www.barrykozak.com](http://www.barrykozak.com)

Barry Kozak is a Subject Matter Expert in the legal, financial, and policy issues regarding:  
Retirement | Aging | End-of-Life | Estate & Legacy | Tax

## Education

*Master's degree (MPP) in Public Finance and Taxation, University of Chicago, Harris School of Public Policy Studies, Chicago, IL (2009)*

*Master's degree (LLM) in Employee Benefits, The John Marshall Law School, Chicago, IL (2000)*

*Juris Doctor (JD) degree, The John Marshall Law School, Chicago, IL (2000)*

*Bachelor's degree of Science (BS), Applied Statistics, The University at Albany, Albany, NY (1994 in absentia)*

## Professional Designations

*Certified Pension Consultant (CPC), American Society of Pension Professionals & Actuaries, Arlington, VA (2001)*

*Attorney, Illinois Registration and Disciplinary Commission, Springfield, IL (2000)*

*Chartered Financial Consultant (ChFC), The American College, Bryn Mawr, PA (1996, voluntarily inactivated)*

*Enrolled Actuary (EA), The Joint Board for the Enrollment of Actuaries, U.S. Department of the Treasury, Washington, DC, (1995, voluntarily inactivated)*

*Registered Representative (Series 7 and 63), FINRA, Washington, DC (formerly, The National Association of Security Dealers) (1995, voluntarily inactivated)*

## Recognition, Honors and Awards

*Distinguished Scholar in Residence, Loyola University Chicago School of Law (effective January 2017)*

*Distinguished Service Award, The John Marshall Law School Alumni Association (2012)*

*Member, Inaugural class of Nolan Fellows, The American Bar Association Section of Taxation (2001)*

## Professional Experience

October Three Consulting, LLC., Chicago, IL, *Consultant* (2017 - present)

Retirement HELP, Inc., Chicago, IL, *President* (2015 - present)

The Law Offices of Barry Kozak, Chicago, IL *Attorney* (2015 - present)

The John Marshall Law School, Chicago, IL, *Director of Elder Law Programs* (2010 – 2015), *Associate Director of the graduate Tax Law programs* (2005 - 2007), *Associate Director of the graduate Employee Benefits programs* (2001 - 2005, full time 2005 - 2010)

Chicago Consulting Actuaries (now part of Aon Hewitt), Chicago, IL, *Legal Consultant* (part time 2001 – 2005)

Bell, Boyd & Lloyd, LLC (now part of K&L Gates), Chicago, IL, *ERISA Associate Attorney* (2000 – 2001)

*Various clerking positions while a full time law student* (1996 – 2000)

Consulting Actuaries International Inc., New York, NY, *Senior Manager and Actuary* (1994 – 1996)

Belcor Pension Consultants, New York, NY, *Director of Actuarial Services* (1993 – 1994)

Pay Plans Corp., New York, NY, *Retirement Plan Consultant* (1990 – 1993)

The Ibex Group, New York, NY, *Senior Pension Administrator and Consultant* (1988 – 1990)

Improved Funding Techniques, Inc., Lynbrook, NY, *Pension Consultant* (1987 – 1988)

## Current Academic Appointments

The John Marshall Law School, Chicago, IL, *classes in estate planning* (2015 – present)

Loyola University Chicago School of Law, Chicago, IL, *classes in Elder Law and Gerontology* (2015 – present)