



## Jodi H. Epstein

*Partner*

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### **PRACTICE AREAS**

Employee Benefits

Qualified Retirement Plans

Executive Compensation and  
Fringe Benefits

Health and Welfare Plans

### **EDUCATION**

Harvard Law School, 1993, J.D.,  
*cum laude*

Stanford University, 1988, B.A.,  
with distinction

### **CLERKSHIP(s)**

Clerkship with the Honorable  
Suzanne B. Conlon, Federal  
District Court for the Northern  
District of Illinois

### **BAR AND COURT ADMISSIONS**

District of Columbia

Illinois

Jodi H. Epstein is a partner in Ivins, Phillips & Barker's Employee Benefits practice. She focuses on qualified plans, with particular expertise in integrations after acquisitions, setting up benefit platforms, and advising qualified plan committees regarding their fiduciary duties. Jodi's practice includes day-to-day compliance issues, such as assisting with implementation of new legislation and regulations, filing determination letter applications for qualified plans, trouble-shooting when glitches arise in plan operations, and helping qualified plan committees monitor plan investments and plan vendors. Her practice also includes the one-of-a-kind issues that can arise, usually in connection with M&A activity. Representative clients include General Electric and The Boeing Company.

Jodi is well-versed in the complexity and challenges raised by large controlled groups. Clients appreciate Jodi's ability to manage projects involving multiple plan vendors, often on a tight timetable. Her client service and responsiveness are unsurpassed.

### **REPRESENTATIVE MATTERS**

- Over the last decade, for a single multinational client, Jodi has helped merge more than 100 frozen defined contribution plans down into 2 plans. She helped develop a "Gatekeeper Process" for merger approvals, and she assists with the blackout notice and other participant communications.

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- Jodi advises Plan committees on a regular basis. She helps them navigate the complex rules involved with IRC and ERISA compliance, and helps them fulfill their ERISA fiduciary duties by monitoring vendors and overseeing investments.
- Jodi has drafted full-scale benefits programs following an acquisition or spinoff. Developing these new benefit platforms has included drafting new plan documents and SPDs, negotiating trustee and other vendor agreements, and crafting participant communications.

**MEMBERSHIPS & AFFILIATIONS**

D.C. Bar Tax Section, Employee Benefits Committee

American Bar Association